OMS

The *Opioid Agonist Therapy Monitoring System*

OPIATE

Initiative

Introduction

PowerPoint Tutorial

- This PowerPoint tutorial is designed as a guide to help you become familiar with the *Case Management Log* Excel Spreadsheet

- After walking through this PowerPoint tutorial, you should be able to enter data into the Excel *Case Management Log*, create graphs, and print graphs specific to the numbers you enter
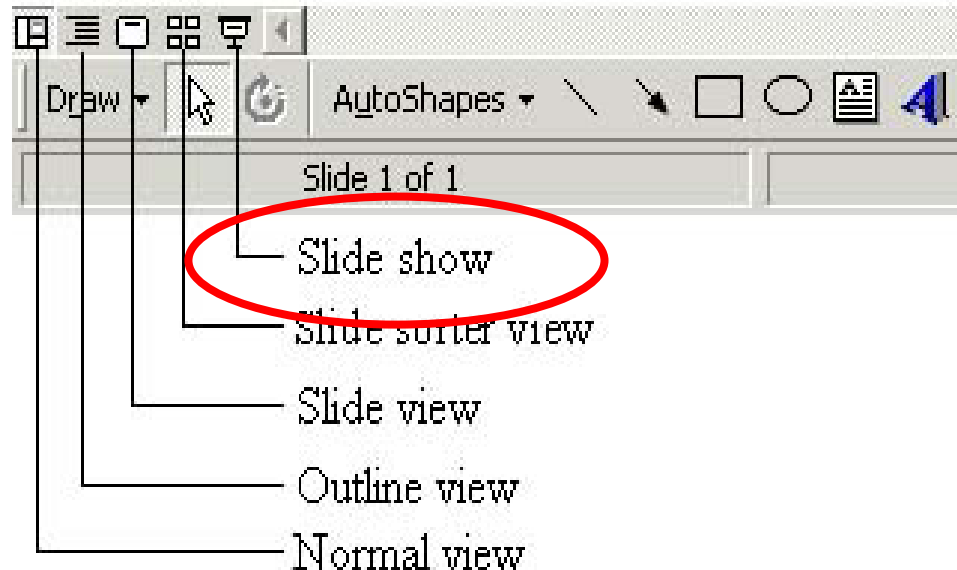
PowerPoint Tutorial

- The first part of this tutorial is designed to give you basic knowledge of Excel

- If you are unfamiliar with Excel, take the time to read through these slides

- If you are familiar with Excel, please skip to slide 26 where information about the Excel *Case Management Log* begins
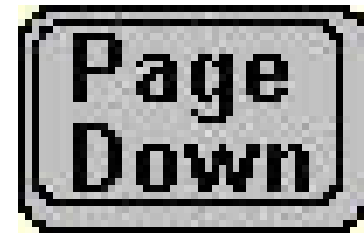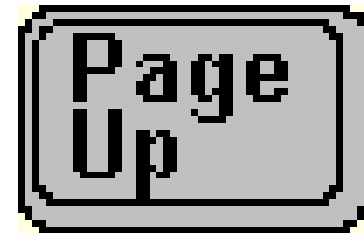
PowerPoint Tutorial

- Be sure to view this presentation using the *Slide Show* option

- Find the *Slide Show* button near the bottom of your screen and left click

PowerPoint Tutorial

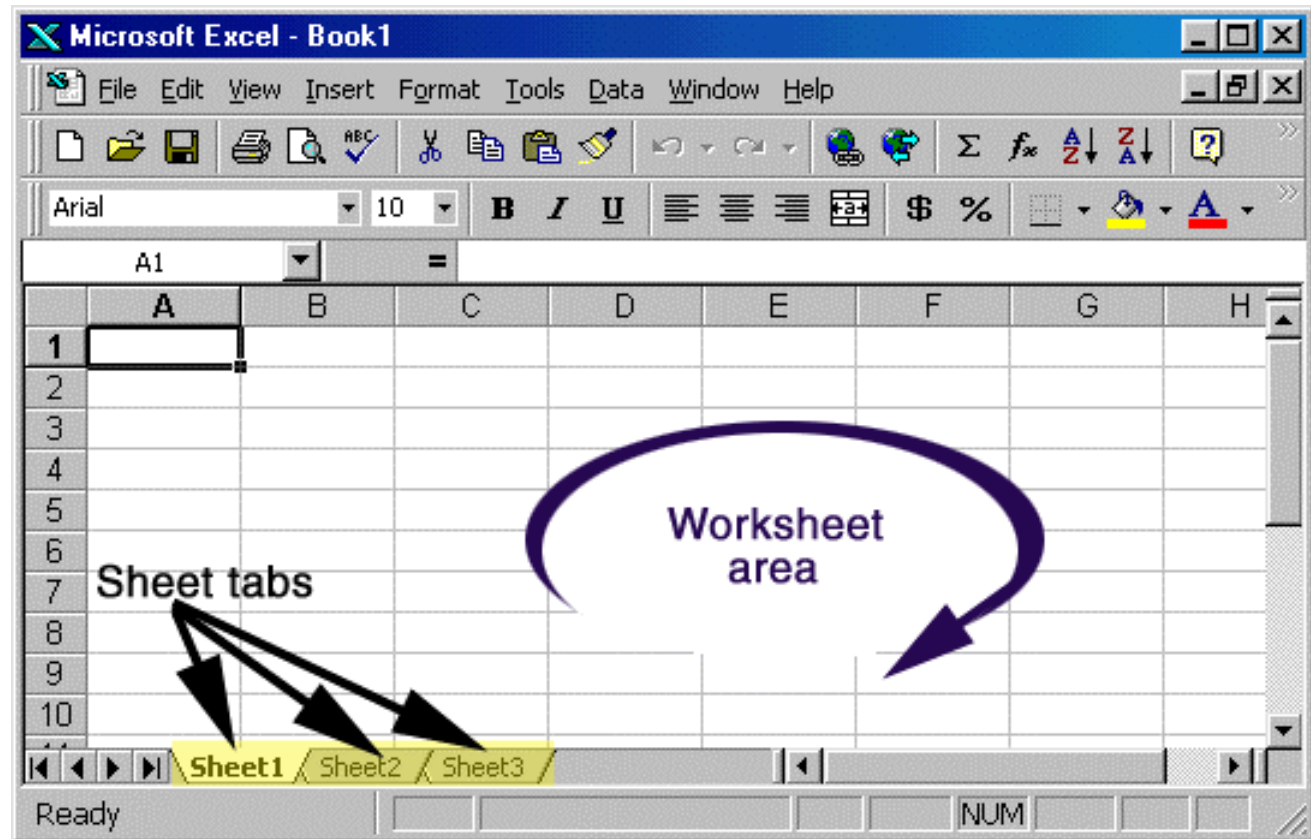- While in the *Slide Show* view, use the Page Up and Page Down keys to flip through the slides

Page Up

Page Down

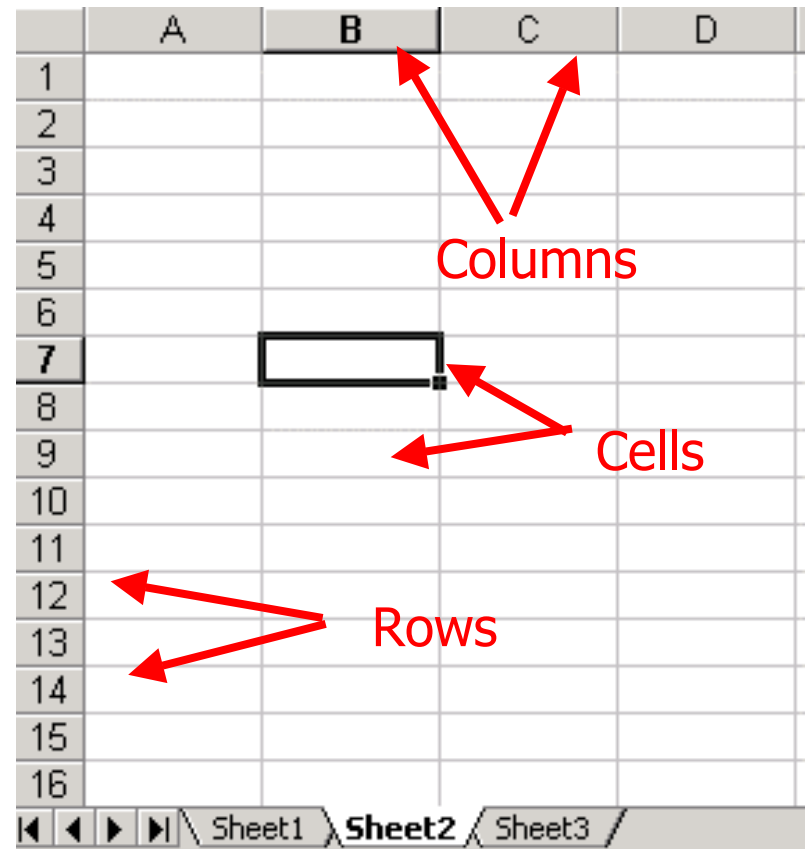# Training for the Excel Spreadsheet

Excel Worksheet

This is the general layout of an Excel worksheet

Columns, Rows, and Cells

- Every spreadsheet has columns, rows, and cells

- In this picture, the active cell, B7, is the cell outlined with the dark border

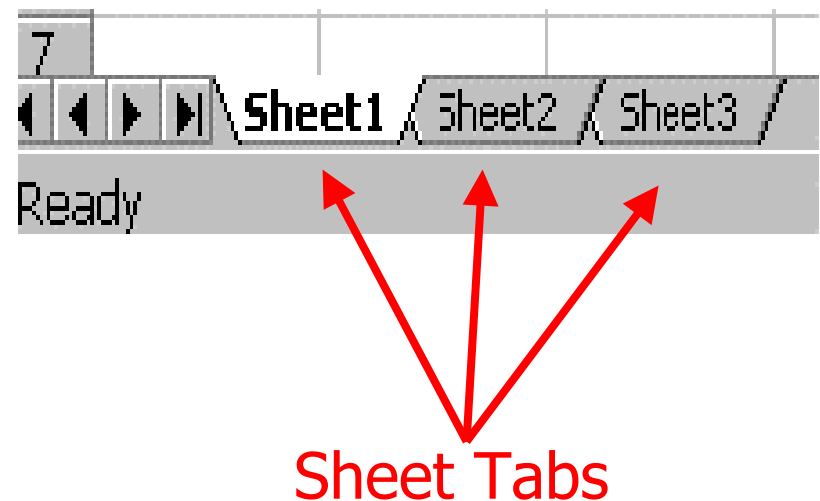- When a cell is active, a number can be entered into that cell

Referencing Cells

	A	B	C	D	E
1					
2		B2	C2	D2	E2
3					E3
4	A4	B4			
5				D5	
6		B6			

- When referencing cells, the column letter is named first and the row number is named second

Sheet Tabs

- Each sheet tab represents a different sheet in the workbook
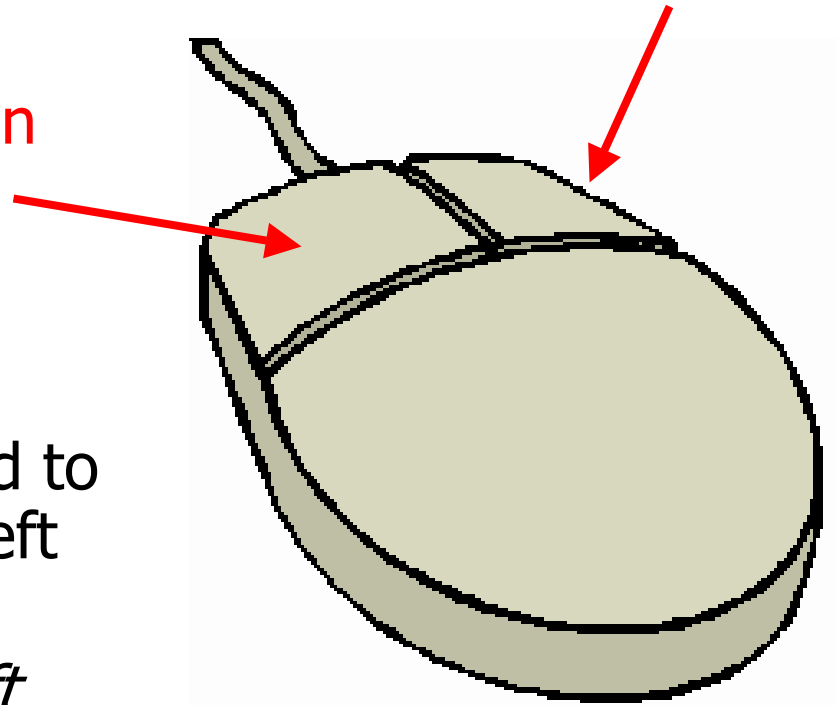- In this example, *Sheet 1* is highlighted because it is currently active

Sheet Tabs

Moving Around the Spreadsheet
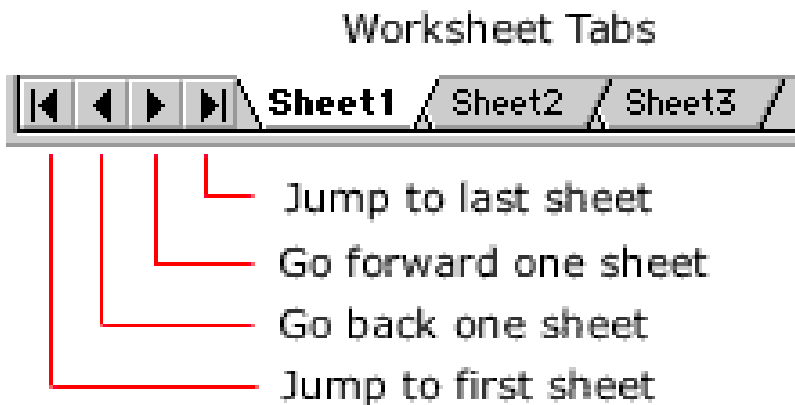
Using the Mouse

Right Mouse Button

Left Mouse Button

- The main button used to move around is the left mouse button
- Use this button to *left click*

Using Sheet Arrows

Workbook Navigation

Worksheet Tabs

| ◄◄ | ◄ | ► | ►► |\ **Sheet1** / Sheet2 / Sheet3 /

Jump to last sheet
Go forward one sheet
Go back one sheet
Jump to first sheet

- Another way to move around is to left click on the arrow buttons at the bottom of your screen
- As shown in the picture, they can be used to move among worksheets
- Not all of the tabs can be displayed on the screen at once. If the last tab you see is *Couns7* (counselor 7), click on the black arrow that will move you forward one sheet and the *Couns8* (counselor 8) tab will come into view

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Using Scroll Bars

- There are scroll bars on both the right side and bottom of your screen
- Right click on the top or bottom arrows if you want to move up or down
- To move rapidly down cells (e.g., from row 1 to 1235), click on the side bar and drag it down to cell 1235
- Excel will display a box indicating the rows you are passing so you know where to stop
- When you are at the row you want, release the mouse button

Top Arrow

Side Bar

Bottom Arrow
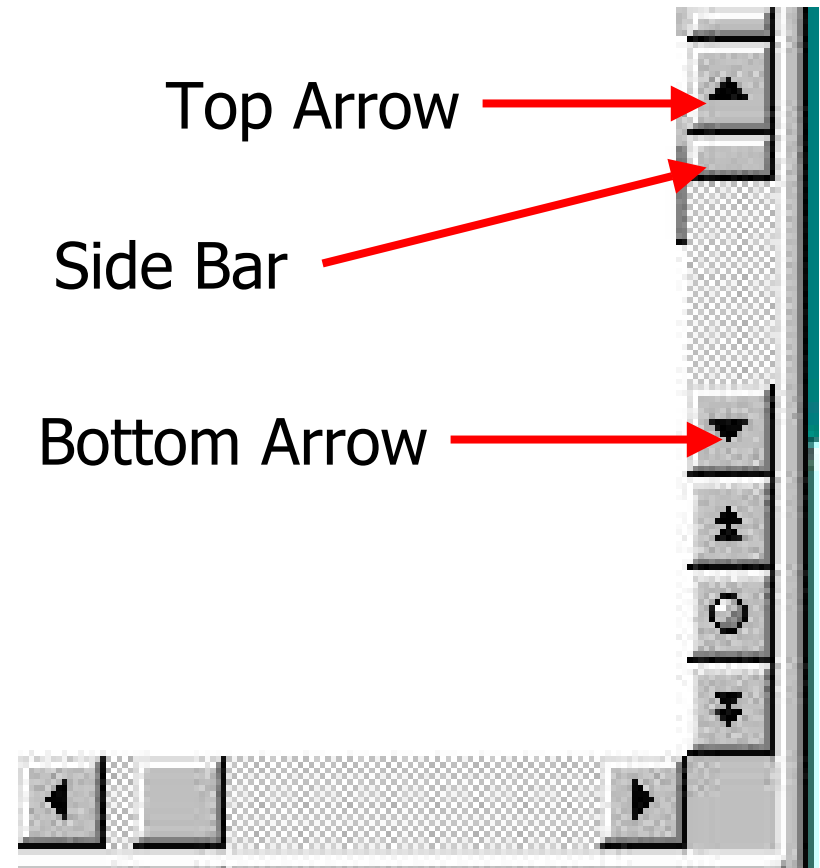
Using the Arrow Keypad

- The arrow keypad located next to the number pad on the left side of your keyboard will move you up, down, left, or right on the spreadsheet

Using Freeze Panes

- Many spreadsheets, including the *Case Management Log*, are set up with column and row headings

- But, as you start to move around a large spreadsheet, you can easily get thrown off course when your headings scroll out of view

- When you are in the middle of the spreadsheet and the headings are not in view, it is hard to know if you are entering the correct information into the correct row or column

- In this situation, using an option called *Freeze Panes* is a great way to move around the spreadsheet and still have the row and column headings in view

Using Freeze Panes

- The Freeze Panes feature is very useful because it allows you to see the column and row headings on the Excel Spreadsheet no matter where you move—the headings do not disappear!

- The frozen column and row headings remain visible as you move through the rest of the worksheet

Using Freeze Panes

- In order to freeze both the column and row headings, left click in a cell below the row that you want to freeze and to the right of the column you want to freeze

- Then go to the WINDOW Menu and left click on *Freeze Panes*

- See example on next slide

Using Freeze Panes

Using Freeze Panes

- Freezing both the ROW and the COLUMN will look like this
- Lines appear to indicate the frozen panes
- Cell D11 is the first cell that is not frozen

Using Freeze Panes

- Rows 1-10 and Columns A-C will stay frozen as you move throughout the spreadsheet

- Notice Rows 10 & 24 and Columns C & I are right next to each other

Using Freeze Panes

- To unfreeze panes, go to the WINDOW Menu and click on *Unfreeze Panes*
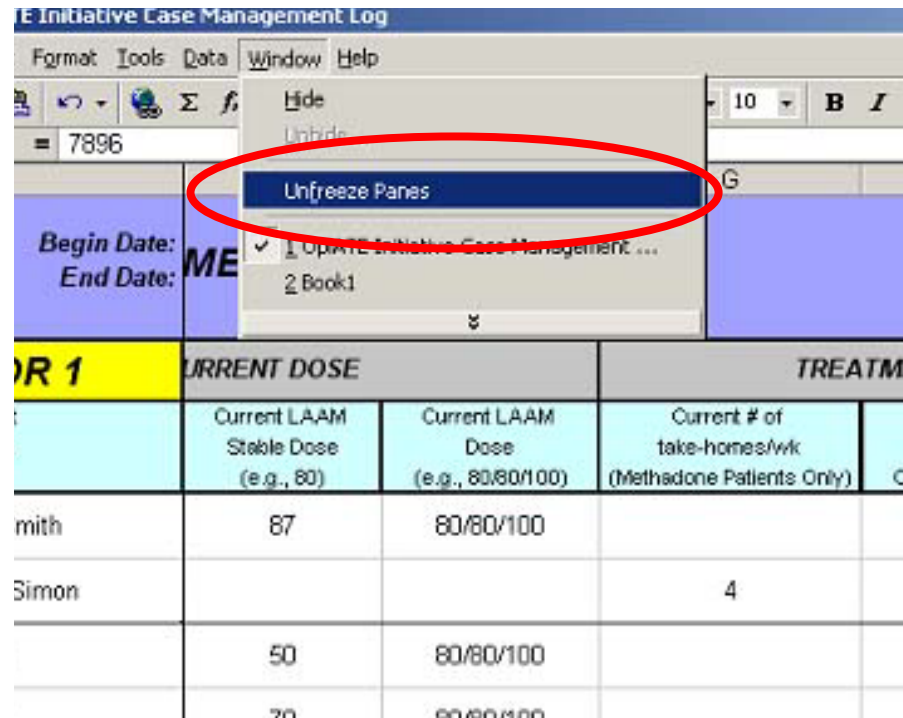
Using Freeze Panes

- The next slide has an animated example of the Freeze Panes option

- Make sure you are viewing this presentation using the *Slide Show* option (see slide 5 for details)

Using Freeze Panes (example)

Case Management Log

Case Management Log

- Now that the basics of Excel have been covered…
- Let's look at the *Case Management Log*

Getting Started

- In order to open the *Case Management Log* Excel file, insert the OMS CD into your CD drive. Then double click on the Excel icon that looks like this.
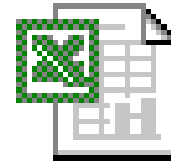
OpiATE Initiative Case Management Log

Getting Started

- Before the spreadsheet opens, a box like this will pop up ➝
- Click on the box that says *Enable Macros*

Microsoft Excel

The workbook you are opening contains macros.
Some macros may contain viruses that could be harmful to your computer.

If you are sure this workbook is from a trusted source, click 'Enable Macros'. If you are not sure and want to prevent any macros from running, click 'Disable Macros'.

[Tell Me More]

☑ Always ask before opening workbooks with macros

[Disable Macros] [Enable Macros] [Do Not Open]

Case Management Log

This is an example of the spreadsheet that will open

Spreadsheet Dynamics

- The *Case Management Log* has enough rows to hold data for 12 different counselors
- Each counselor has enough space to enter data for 100 patients
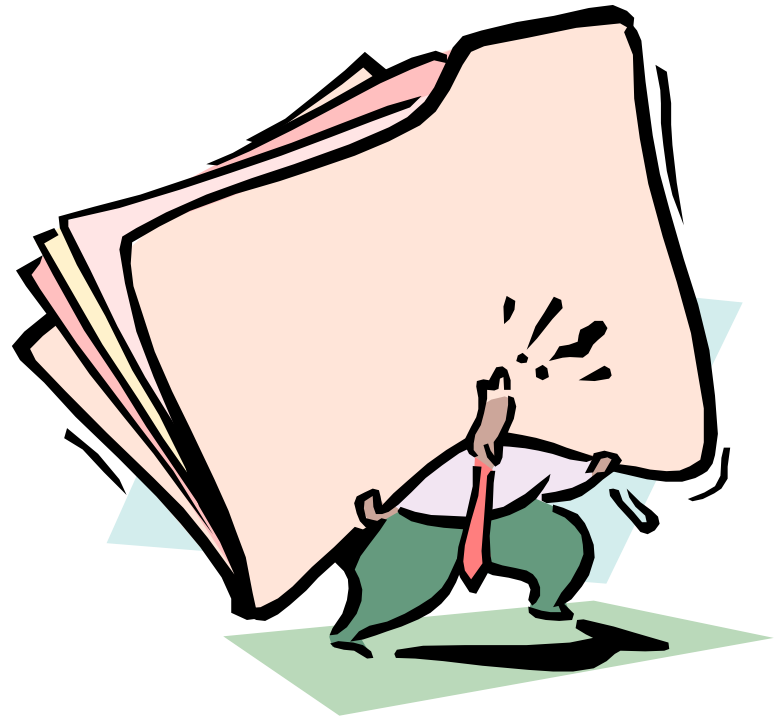
Getting Started

- In the *Case Management Log*, there are 17 sheet tabs at the bottom of the page

- The first tab is labeled *Case Management Log*. This is where all data will be entered and all counselor and clinic totals will be tabulated.

- The next tab is labeled *AOS.* This is where *Abstinence Orientation Scale* (*AOS*) scores are entered.

- Twelve other tabs are labeled Couns1, Couns2, etc. This is where individual counselor charts will be created.

- Another tab is labeled *Counselors + Clinic*. This is where you find charts showing data for the entire clinic.

- The tab labeled *counselor logs* contains logs that can be printed.

- The last tab labeled *chart reference cells* contains formulas and chart set ups. This part of the log is automated so you won't have to enter data into this worksheet.

Data Entry

Case Manager Information

- We encourage you (case managers) to complete the *Case Management Log* as you see patients

- You will benefit most from this information if you refer to the form and update it at each patient's visit

- If you wait until the end of the month to complete the Log, you may have to go back and refer to patient charts that are not immediately on hand

Data Entry

- Data can be entered using either the number row on the keyboard or by using the number pad
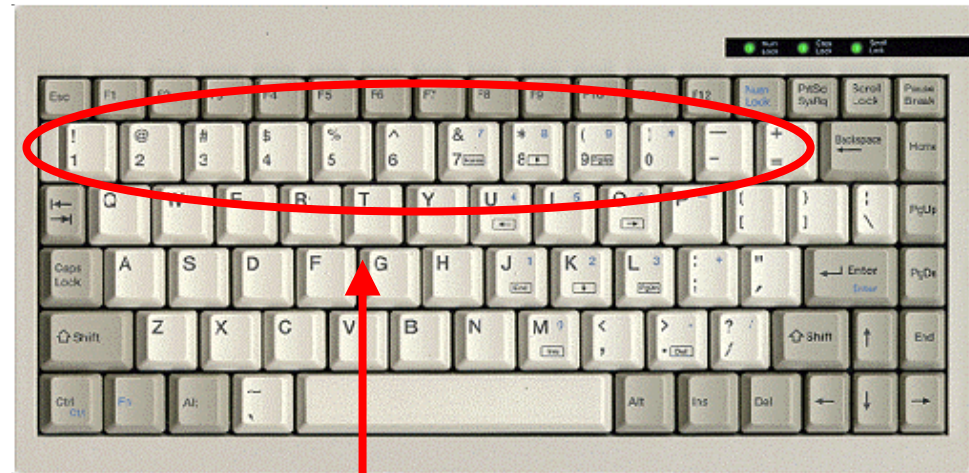
Number Row

Data Entry

- If you use the number pad, make sure the Num Lock key is active
- If it is not pressed, only the arrow pad within the numeric keypad will work

Numeric Keypad

Data Entry

- Each counselor has a specific area to enter data

- All graphs and formulas for each counselor are mapped to specific rows and columns in the spreadsheet

- Look for individual counselor headings to make sure you are entering data in the correct area (see next slide for examples)

Data Entry for Counselor 3

For example, Counselor 3 would enter data in rows 237 through 336 under the *Counselor 3* heading

Data Entry for Counselor 7

Microsoft Excel - OpiATE Initiative Case Management Log

File Edit View Insert Format Tools Data Window Help

H702

	A	B	C	D	E	F	
685							
686			Begin Date: 7/1/2003		CASE MANAGEME		
687			End Date: 7/31/2003				
688							
689		**COUNSELOR 7**		*PATIENT INFORMATION*			*CURREN*
690 691 692	review patient status		patient name	last 4 digits of social security number	patient's most RECENT date of clinic entry	current methadone dose (mg)	curren stabl (e.g
693			Steven Bachman	5267	11/15/2002	70	
694			Raymond Williams	3528	1/4/2003	60	
695			Carl McAndrews	8501	4/29/2003	60	
696	C		Charles Johnson				
697			Steven Bachman				
698			Raymond Williams				
			Mel Douglas				

Counselor 7 would enter data in rows 693 through 792 under the *Counselor 7* heading

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Case Management Log Items

- There are 15 items for each patient
- The following slides are examples of data entry for Counselor 1's patients in columns A-O

Data Entry

- For all *Case Management Log* items, make sure you enter a zero into a cell rather than leave the cell blank

- For example, if a patient has not had any counseling visits, enter a *0*

- If the cell is left blank, that patient's zero values will not be averaged into the counselor and clinic totals

Begin Date & End Date

- Don't forget to enter the Begin Date and End Date at the top of the spreadsheet in order to keep track of monthly data
- This date will tell you which period of time to refer to when entering your patient's data

Review Patient Status

- Located in column A
- If a patient has been at a clinic for less than a month AND has tested positive for opioids or tested positive for non opioids, the letter *C* will appear in column A. This indicates that weekly counseling is suggested.

Review Patient Status

- Located in column B
- If a patient's dose level is less than 60 mg of methadone or methadone equivalent, and that patient has tested positive for opioids, the letter *D* will appear in column B. This indicates that a dose review is suggested.

Patient Name

- Located in column C
- You can use either a patient name or a patient number in this column

3	End Date: 7/31/2003			CASE MAN
4				
5	**COUNSELOR 1**		**PATIENT INFORMATION**	
6	review	patient	last 4 digits of	patient's most	curre
7	patient	name	social security	RECENT date	methad
8	status		number	of clinic entry	dose (
9		John Smith	9858	7/30/1991	
10		Kenneth Simon	6523	1/13/1999	75
		George Johnson	5842	4/30/1999	80

45

Social Security Number

- Located in column D
- Enter only the last 4 digits of patient's social security number

	COUNSELOR 1		PATIENT INFORMATION		
3	End Date: 7/31/2003				CASE MA
4					
5	COUNSELOR 1		PATIENT INFORMATION		
6 **7** **8**	review patient status	patient name	last 4 digits of social security number	patient's most RECENT date of clinic entry	curre methad dose (
9		John Smith	9858	7/30/1991	
10		Kenneth Simon	6523	1/13/1999	75
		George Johnson	5842	4/30/1999	80

Clinic Entry Date

- Located in column E
- Enter patient's most RECENT date of clinic entry
- Enter the month, day, and year (e.g., 8/12/2002)

3	End Date: 7/31/2003			CASE MA
4				
5	COUNSELOR 1		PATIENT INFORMATION	
6	review patient status	patient name	last 4 digits of social security number	patient's most RECENT date of clinic entry	curre methad dose (
9		John Smith	9858	7/30/1991	
10		Kenneth Simon	6523	1/13/1999	75
		George Johnson	5842	4/30/1999	80

Current Methadone Dose (mg)

- Located in column F
- If the patient is on methadone, leave the LAAM dose columns empty

CURRENT DOSE			
current methadone dose (mg)	current LAAM stable dose (e.g., 80)	current LAAM dose (e.g., 80/80/100)	cu take (metha
	80	80/80/100	
75			
80			
50			

Current LAAM Stable Dose

- Located in column G
- Enter only the stable dose for this column
- If the patient is on LAAM, leave the methadone dose column and the current number of take-homes column empty

Current LAAM Dose

- Located in column H
- Enter the entire LAAM Dose
- Remember to enter data in both LAAM columns

2	*SE MANAGEMENT LOG*		
3			
4			
5	*CURRENT DOSE*		
6	current methadone dose (mg)	current LAAM stable dose (e.g., 80)	current LAAM dose (e.g., 80/80/100)
9		80	80/80/100
10	75		
11	80		
12	50		

Current # of Take-home Doses

- Located in column I
- This column is for methadone patients only
- Leave this cell blank for LAAM patients

	current # of take-homes/wk (methadone pts only)	# counsel. visits in current month	# utox screens in current month	
	TREATMENT PLAN			
9		2	1	
10	3	2	1	
11	3	2	1	

Number of Counseling Visits

- Located in column J
- Enter the number of visits for the current month

	TREATMENT PLAN		
current # of take-homes/wk (methadone pts only)	# counsel. visits in current month	# utox screens in current month	
	2	1	
3	2	1	
3	2	1	

Number of Utox Screens

- Located in column K
- Enter the number of utox screens for the current month

	TREATMENT PLAN			
	current # of take-homes/wk (methadone pts only)	# counsel. visits in current month	# utox screens in current month	
9		2	1	
10	3	2	1	
11	3	2	1	

Positive Urines for OPIOIDS

- Located in column L
- Enter the number of positive urines for OPIOIDS in the current month

	OUTCOMES IN CURRENT MONTH		METHADONE
	positive urines for OPIOIDS in current month	positive urines for non-opioids in current month (EXCEPT cannabinoids or alcohol)	LAAM dose converted to methadone (mg)
9	0	0	67
10	0	0	0

Positive Urines for Non-OPIOIDS

- Located in column M
- Enter the number of positive urines for Non-OPIOIDS in the current month
- Do not count positive urines for cannabinoids or alcohol

	OUTCOMES IN CURRENT MONTH		METHADONE
	positive urines for OPIOIDS in current month	positive urines for non-opioids in current month (EXCEPT cannabinoids or alcohol)	LAAM dose converted to methadone (mg)
9	0	0	67
10	0	0	0

Methadone Dose Equivalency

- Located in column N
- Numbers in this column will appear automatically
- Excel will convert all LAAM doses to methadone
- You do not need to do anything with this column

	METHADONE EQUIVALENCY		
	LAAM dose converted to methadone (mg)	methadone dose for all patients	
9	67	67	
10	0	75	
11	0	80	

Methadone Dose for all Patients

- Located in column O
- Numbers in this column will appear automatically
- You do not need to do anything with this column

	METHADONE EQUIVALENCY		
	LAAM dose converted to methadone (mg)	methadone dose for all patients	
9	67	67	
10	0	75	
11	0	80	

Sums Columns

- Columns P, Q, & R are columns you can add yourself
- Each column is set up to create a SUM of any numbers you enter
- These columns will not be displayed graphically, but can be handy if you want to keep track of how many group counseling sessions each patient attended or track other changes
- The summed totals will appear in the *Counselor Statistics* row at the end of each counselor's data

Type your heading in here

Counselor *AOS* Scores

- The *Case Management Log* will configure the *Abstinence Orientation Scale* (*AOS*) score of each individual counselor and the average *AOS* score for the clinic

- Go to the *AOS* Sheet tab

- Enter each counselor's responses, ranging from 1-5, to all 14 *AOS* items

- If a counselor did not answer a question, either leave the cell blank or enter a "0"

- All *AOS* scores will automatically appear in the *Counselor Statistics* row at the end of each counselor's data

- See example of the *AOS* worksheet on the next slide

Abstinence Orientation Scale

	AOS1	AOS2	AOS3	AOS4	AOS5	AOS6	A
Counselor 1	1	2	5	4	2	1	
Counselor 2	1	3	1	2	2	1	
Counselor 3	2	2	2	2	2	2	
Counselor 4	1	2	5	4	2	1	
Counselor 5							
Counselor 6							

Counselor *AOS* Scores

- Once the *AOS* scores are entered, a score is automatically generated
- The scores for each individual counselor appear in the *Counselor Statistics* row at the end of each counselor's data in the *Case Management Log*
- Numbers in this cell will appear automatically

	Percent of utox screens positive for OPIOIDS Past month	Percent of utox screens positive for NON-OPIOIDS Past month	Abstinence Orientation Scale (AOS) Score	
	17	19	2.4	

Patient Changes

New Patients

- When new patients enter the clinic, don't forget to add them to your caseload so their information can be tracked, too

- To add a new patient, go to the first empty row in your own counselor area in the *Case Management Log* and enter the new patient's data

Discharged or Deceased Patients

- If a patient is discharged or deceased, you must delete that patient's entire row of data in order for those numbers not to be figured into the monthly totals

- You won't be able to delete the information in columns N or O because they are automated and contain formulas. Deleting the other information in the row will automatically clear cells N and O.
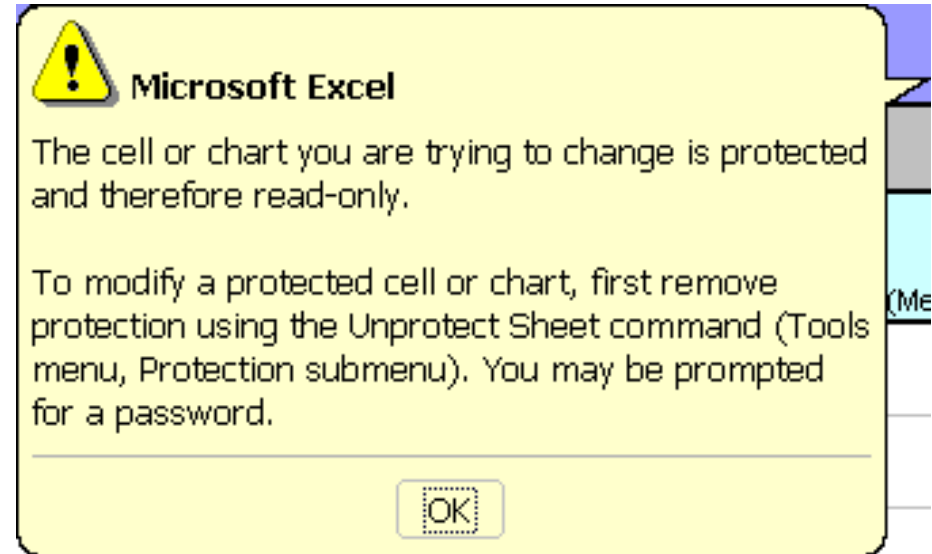
Protection

Case Management Log Protection

- The *Case Management Log* is protected so that no labeled cells or formulas can be accidentally deleted
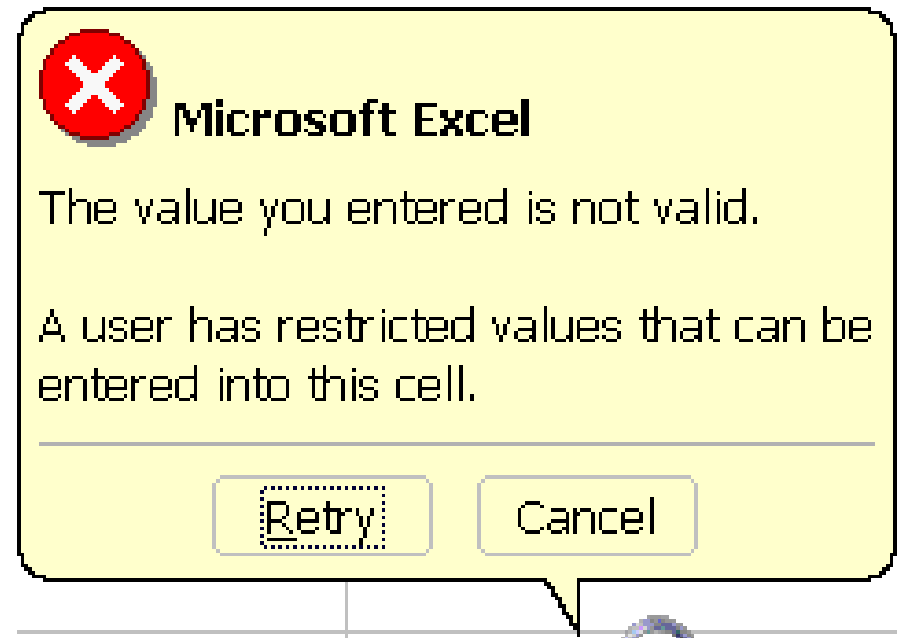- Don't worry, you can't break it!!

Case Management Log Protection

- A warning message will pop up if you try to change a cell that has been protected

- If the warning message does pop up, click the button labeled *OK*

⚠ **Microsoft Excel**

The cell or chart you are trying to change is protected and therefore read-only.

To modify a protected cell or chart, first remove protection using the Unprotect Sheet command (Tools menu, Protection submenu). You may be prompted for a password.

[OK]

Case Management Log Protection

- This is an example of another warning that will pop up if you enter an invalid value into a cell

- If this happens, check the information you are entering to make sure it is correct

Microsoft Excel

The value you entered is not valid.

A user has restricted values that can be entered into this cell.

[Retry]   [Cancel]

Case Management Log Errors

- If you get error messages while in the *Case Management Log*, make sure to check the data you are entering!

- There is always human error involved in data entry

- Don't automatically assume errors are due to the design of the spreadsheet

Case Management Log Errors

- To help minimize incorrect data entry, a message will pop up when you click on specific cells

- For example, this message states the definition of non-opioids and is a reminder that cannabinoids and alcohol should not be counted toward positive utox screens for non-opioids

- There are other reminder messages for the following cells: clinic entry date, utox screens, and positive opioids

Non-opioids

Non-opioids include cocaine, amphetamines, benzodiazepines, barbiturates, and PCP. DO NOT INCLUDE cannabinoids or alcohol.

Outcome Totals

Counselor Statistics

- Located at the end of each Counselor's row
- Numbers in this column will appear automatically
- These numbers will be displayed graphically

	Totals		Counselor 1 Statistics	% patients on 60 mg or above of methadone or methadone equivalent	% patients on 70 mg or above of methadone or methadone equivalent	% patients on 80 mg or above of methadone or methadone equivalent	Mean # home per v
	C	D	# of patients				
113	4	3	38	76	45	18	3.
114							
115							

Clinic Statistics

- Located at the bottom of the *Case Management Log* in ROW 1378
- Numbers in this column will appear automatically
- These numbers will be displayed in graphs
- NOTE: the number given in the *Mean # of patients* cell for the clinic totals is a mean, not a sum

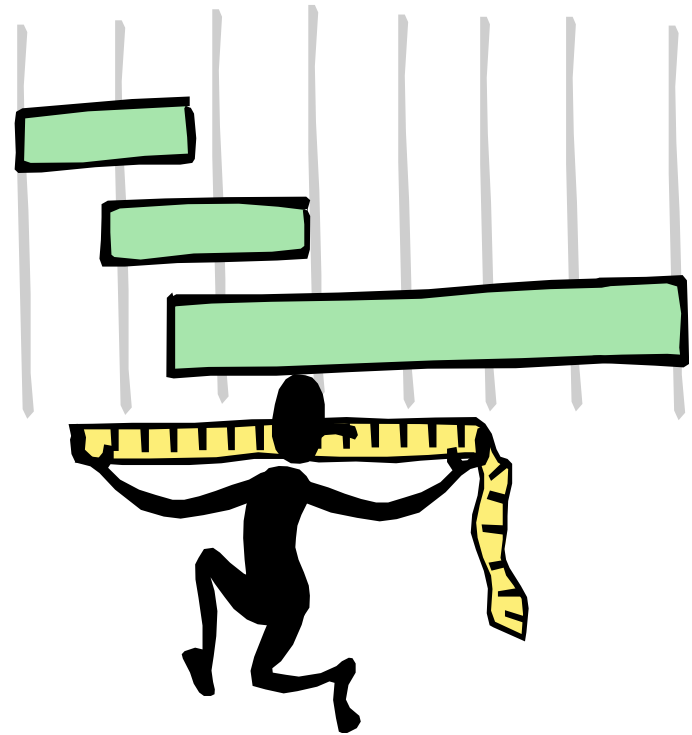|			CASE MANAGEMENT LOG				
CLINIC							
Totals		Clinic Statistics	% patients on 60 mg or above of methadone or methadone equivalent	% patients on 70 mg or above of methadone or methadone equivalent	% patients on 80 mg or above of methadone or methadone equivalent	Mean # of take home doses per week	Mean # of counseling visits per month
C	D	Mean # of patients					
13	10	31	71	31	11	2.8	1.3

Graphs

Graphs

- Creating, printing, and clearing graphs while using the *Case Management Log* can be done by simply clicking buttons
- See the next slides for examples
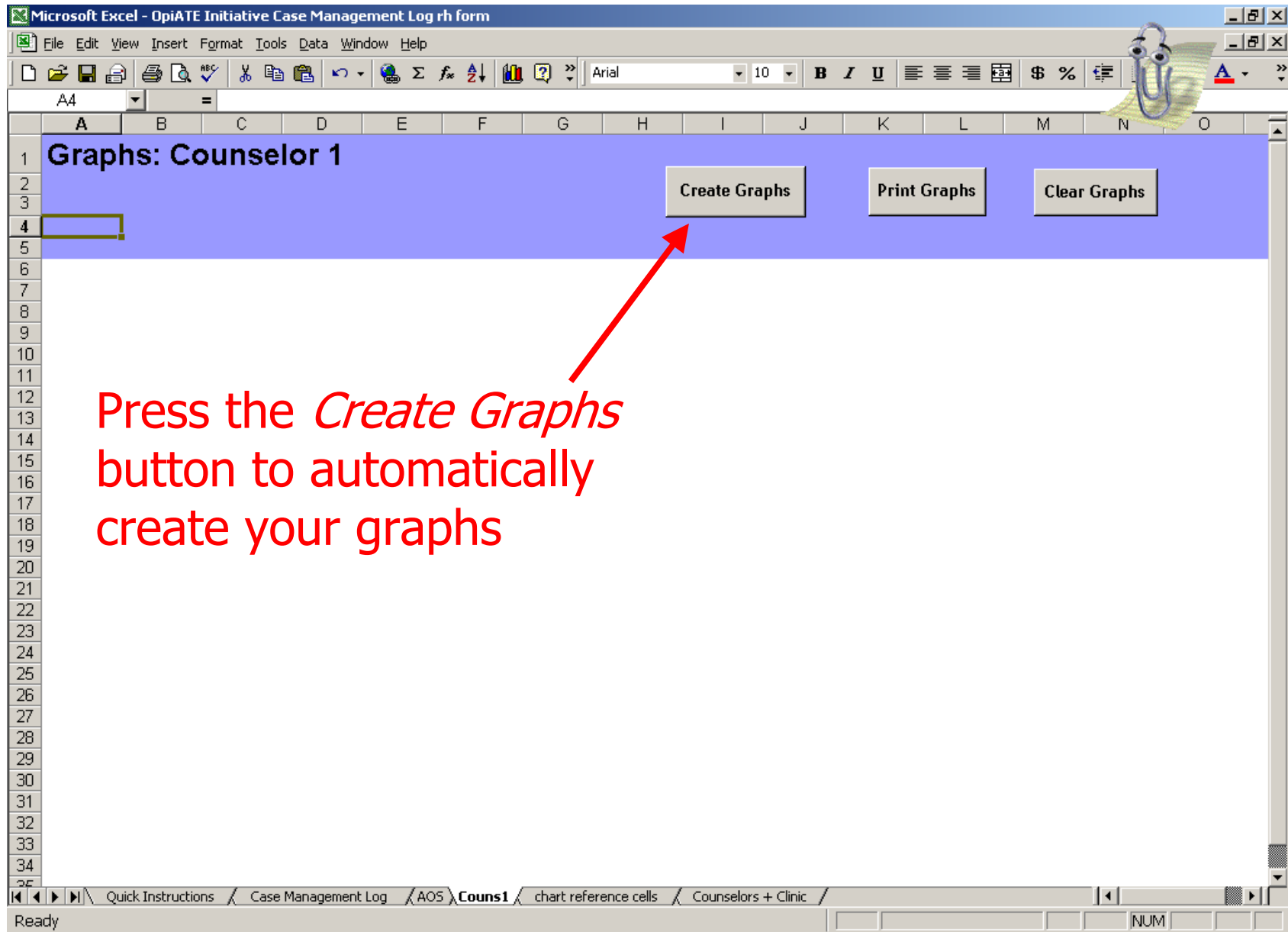
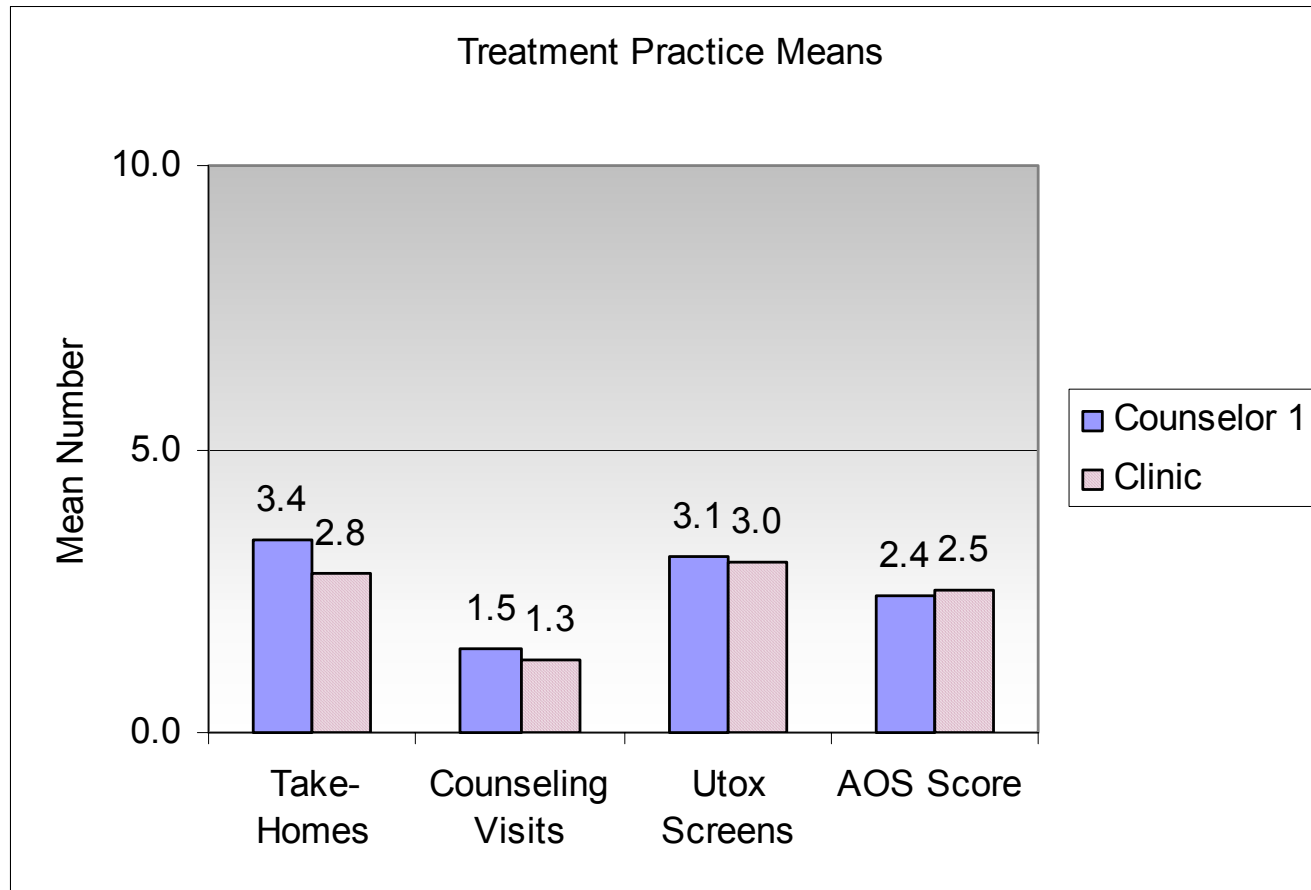Press the *Create Graphs* button to automatically create your graphs
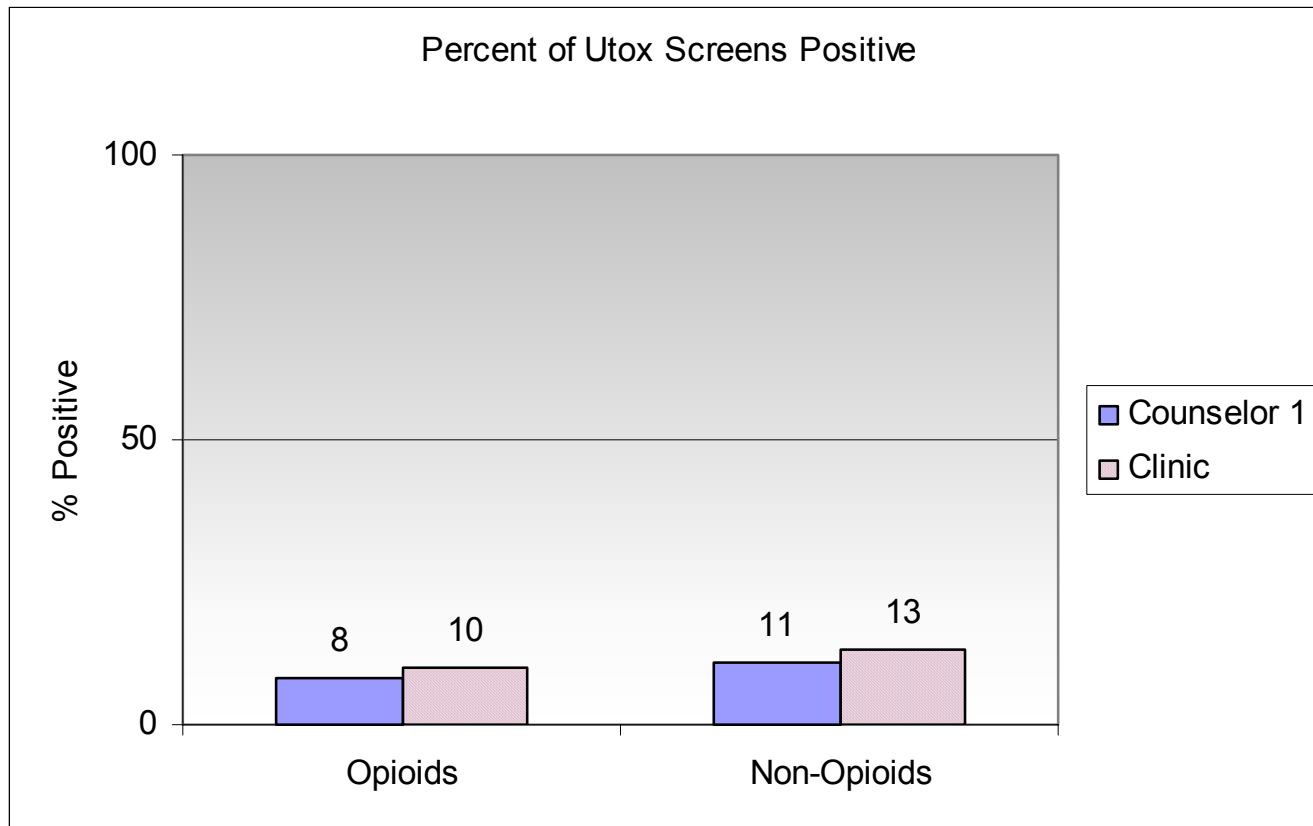
Graph Making

- There are 4 graphs that will come up for each counselor after pressing the *Create Graphs* button
- After pressing this button, you may be prompted for a password before the graphs are created
- If this password prompt does come up, type in the word *opiate*
- Each graph is designed to compare the individual counselor total to the clinic total
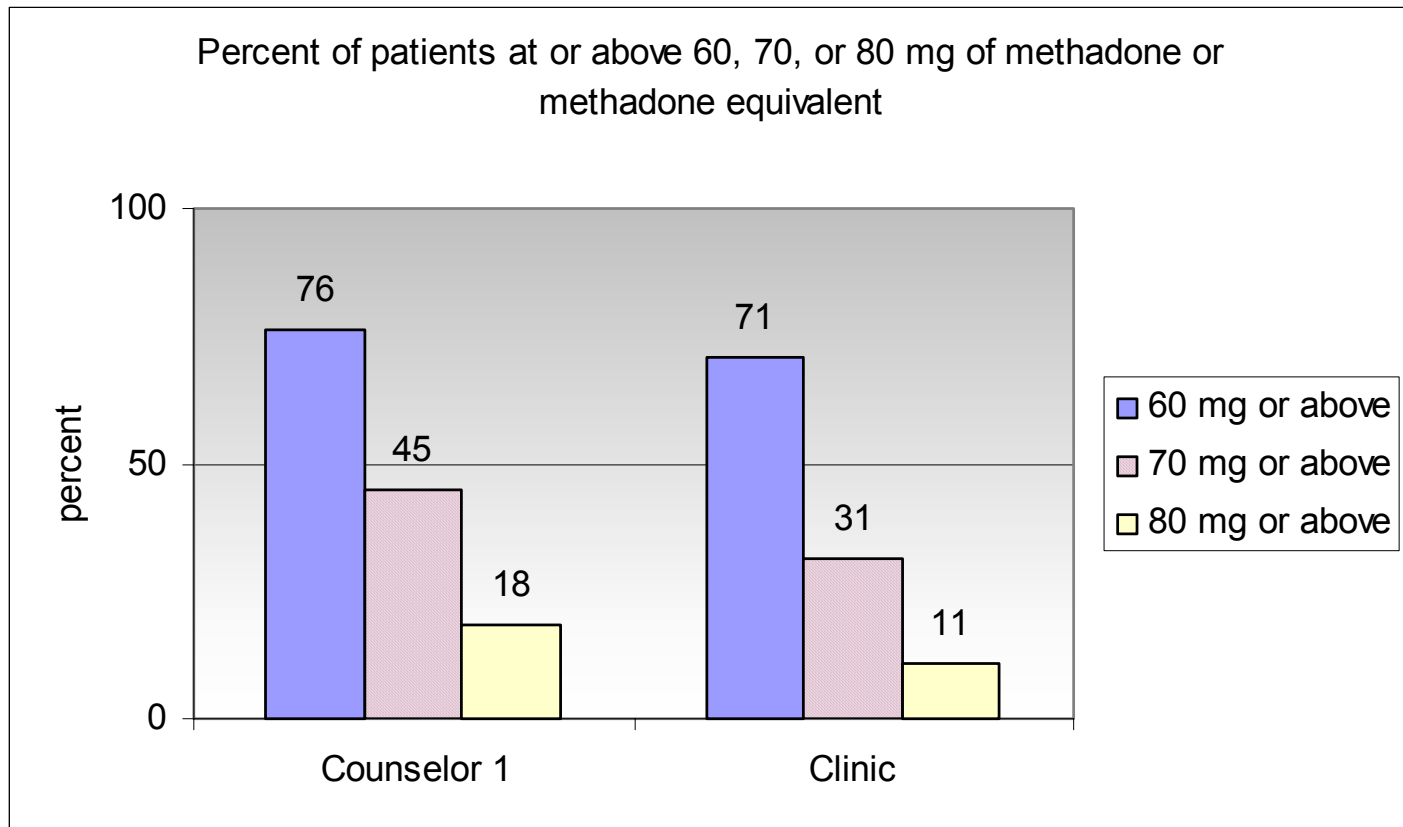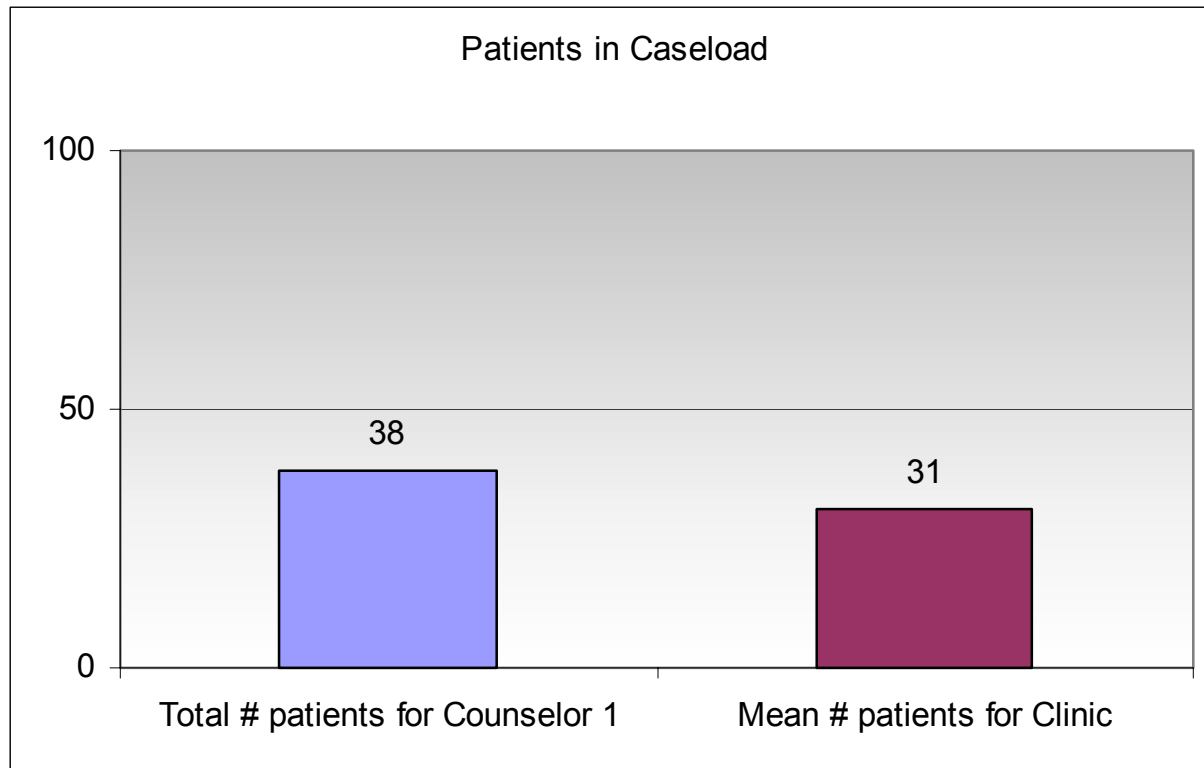- The next 4 slides are examples of the graphs that will pop up

Graph (Examples)

Treatment Practice Means

Mean Number

	Counselor 1	Clinic
Take-Homes	3.4	2.8
Counseling Visits	1.5	1.3
Utox Screens	3.1	3.0
AOS Score	2.4	2.5

Graph (Examples)

Percent of Utox Screens Positive

Graph (Examples)

Percent of patients at or above 60, 70, or 80 mg of methadone or methadone equivalent

Graph (Examples)

Patients in Caseload

- NOTE: the total number of patients for each counselor is shown whereas the mean number of patients for the clinic is shown

Recommended Clinic Ranges

Here are the recommended ranges for the target areas of this project based on a model clinic.

- Take-homes per week: 3-3.5

- Monthly counseling visits: 1-1.5

- Monthly utox screens: 3-3.5
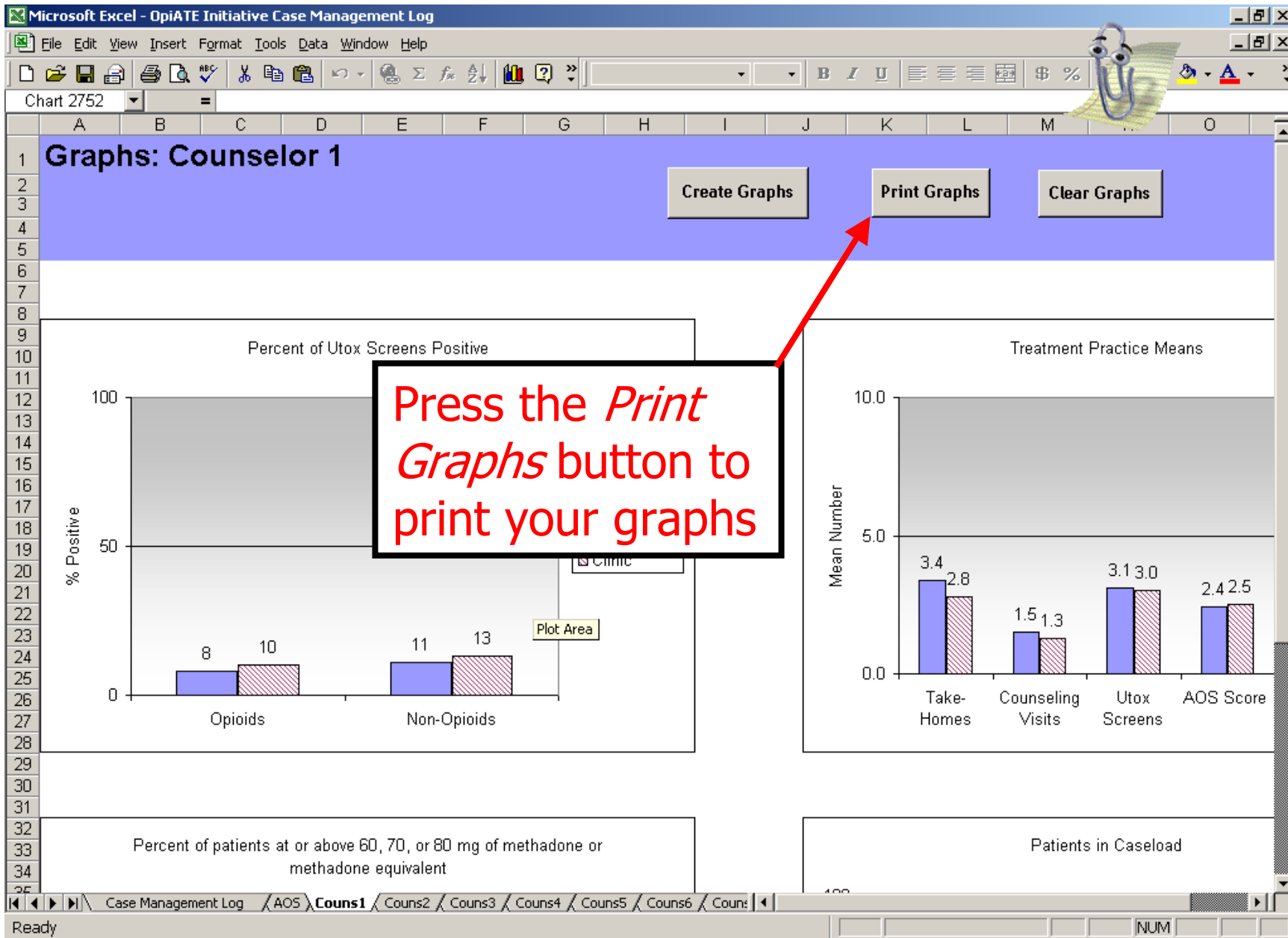
- Percent utox screens positive for opioids: 5-10%

- Percent utox screens positive for non-opioids: 10-15%

- *AOS* score: 3 or lower

- Percent ≥ 60 mg of methadone or equivalent: 75%-85%

Press the *Print Graphs* button to print your graphs

Printing Graphs

- The *Case Management Log* graphs will print on the printer attached to your computer
- The page margins are already set up so that all 4 graphs for each counselor fit on one page

Press the *Clear Graphs* button to delete your graphs
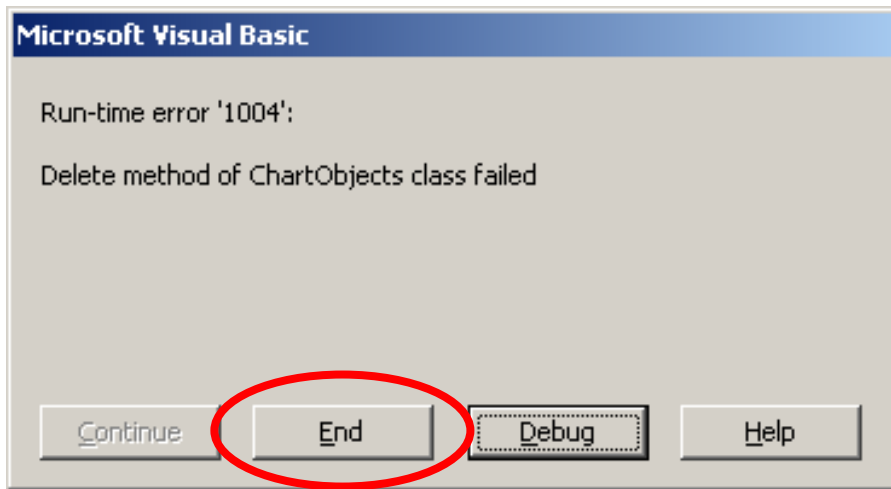
85
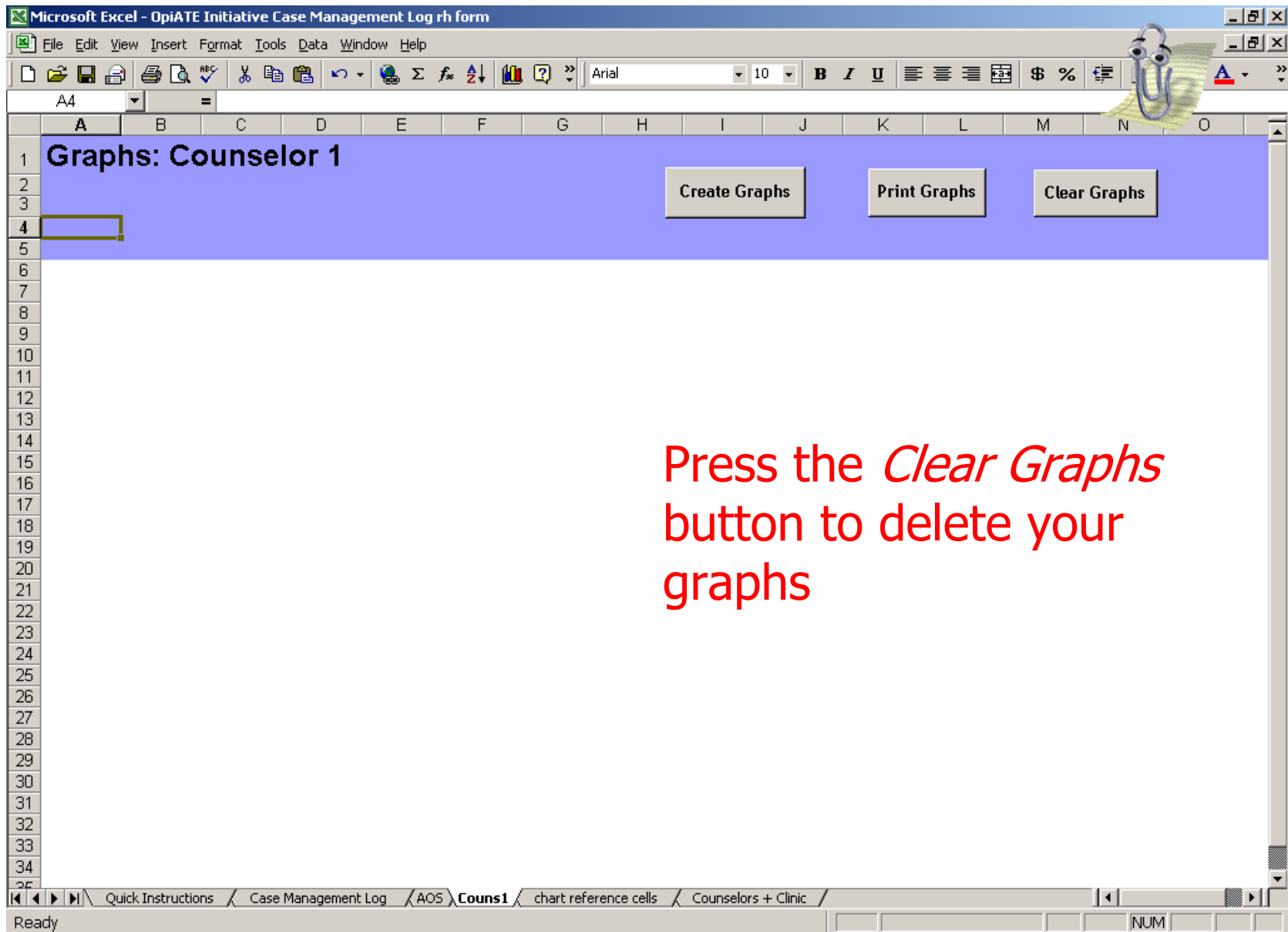
Graph Info

- You do not need to make new graphs every time doses or counseling visits change

- For example, if a patient's dose was entered incorrectly after the graphs have been made, simply change the dose to the correct number and the graph will automatically adjust to this new number

Graph Error

Microsoft Visual Basic

Run-time error '1004':

Delete method of ChartObjects class failed

[Continue] [End] [Debug] [Help]

Note: This is not a problem unless you have 10 or more counselors at your clinic and all your graphs will be created at the same time

- The graphs take up so much space in the Excel program that if you create 10 or more graphs at one time, this error will pop up. If this error comes up and you have not saved your changes, you will lose them. For this reason, make sure you save your changes frequently.

- When this warning does pop up, click on *End*. This will close you out of the program. Then reopen the file and continue making graphs.

- One option (if you have at least 10 counselors at your clinic), is to create graphs for the first 6 counselors, save these changes and close out of the program. Next reopen the program and create the last 7 charts.

Saving Changes

Saving Changes: Step 1
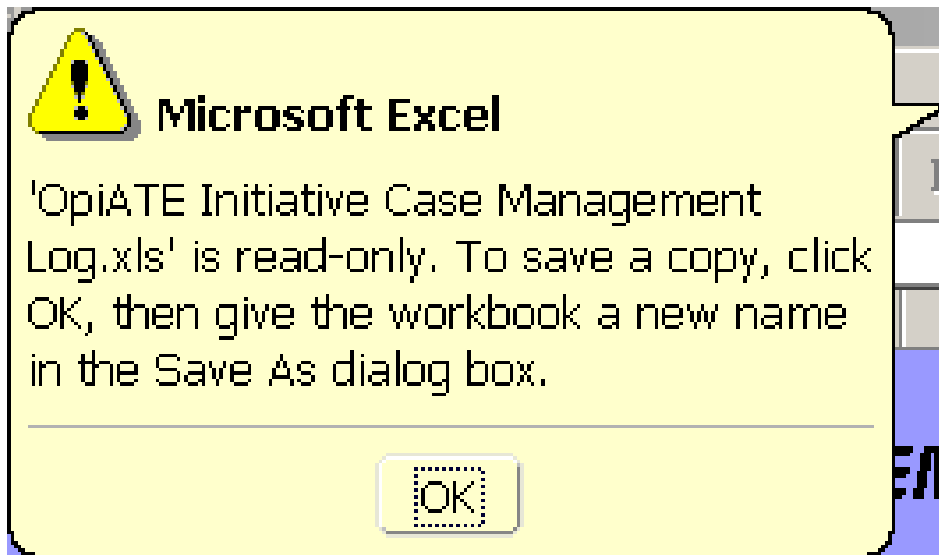
- The *Case Management Log* is on a read-only CD. This means that you cannot save any changes over the original copy.

- Save a copy of the file onto the computer or a disk by going to File→Save. When you do this you will get the message to the left. Follow the directions this message gives you. It is probably best to save it in several places.

Microsoft Excel

'OpiATE Initiative Case Management Log.xls' is read-only. To save a copy, click OK, then give the workbook a new name in the Save As dialog box.

[OK]

Important!

- When you save this file in another place, be sure to give the spreadsheet the same file name (OpiATE Initiative Case Management Log) to ensure the proper functioning of the spreadsheet

- The graphs are linked to the specific name of the file. By changing the file name the graphs are rendered inactive

- Instructions for changing the file name for record keeping purposes will be talked about on Slide 99

Saving Changes

- Because the *Case Management Log* has multiple users it is important for everyone to understand how to correctly save changes that have been made to the Excel file

- There are 2 options to choose when saving any file: *Save* or *Save As*

Saving Changes Using Save

First, let's look at the *Save* option under the File Menu
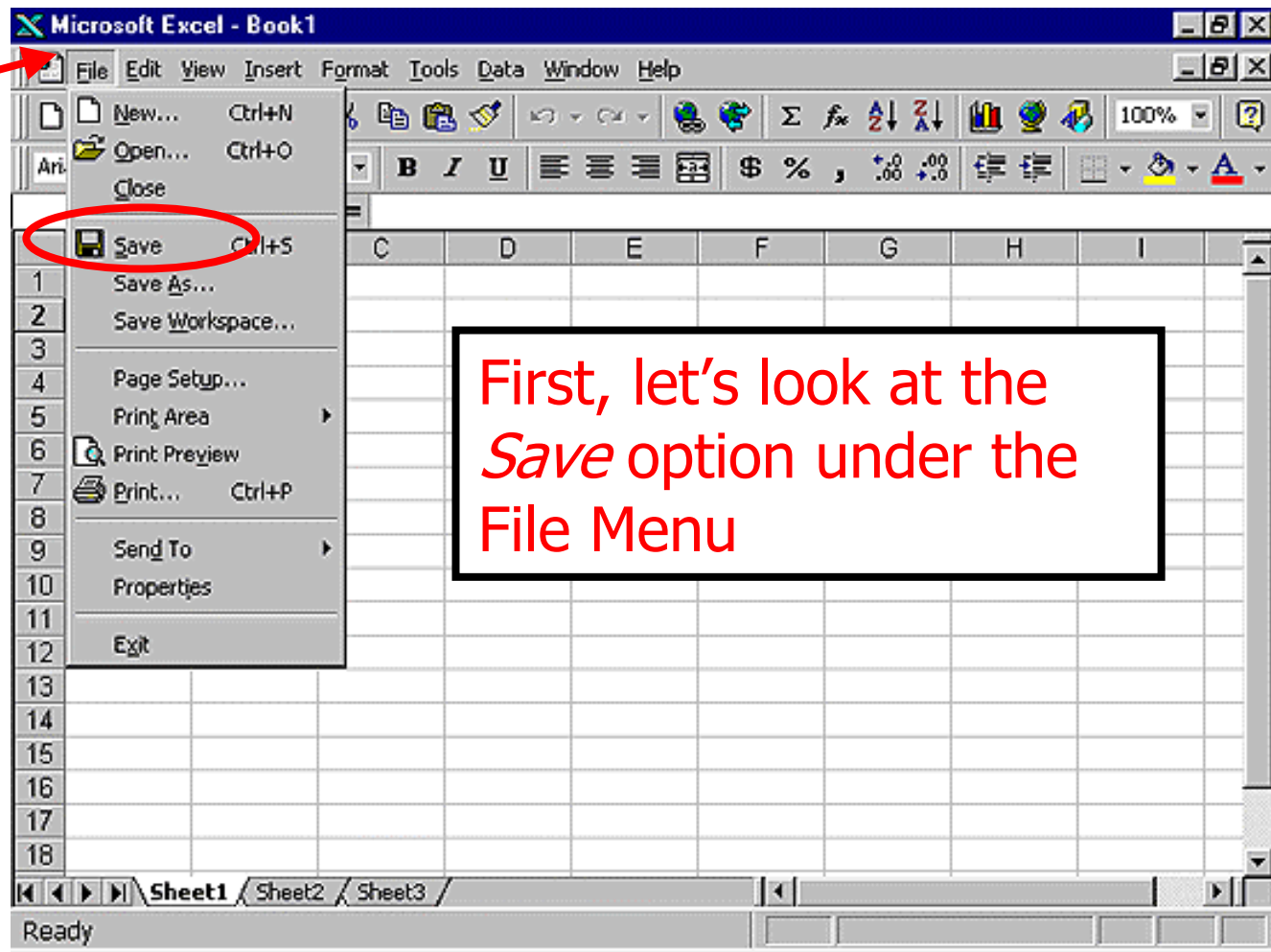
Saving Changes Using Save

- Choosing *Save* will save the changes that you made to the *Case Management Log* using the same file name

- No box will pop up; once you click *Save*, all changes are saved

- When entering the current month's data, you must use the *Save* option

Saving Changes

- Nothing is more frustrating than updating a file and then losing all of the changes you made due to a computer glitch

- One way to minimize this frustration is to save changes frequently and in multiple places (e.g., zip disk, CD, and/or hard drive)!

- Try to save changes every 10 minutes

Saving Changes: Step 2

- Remember to enter all counselor data and to make all counselor graphs before you rename the OpiATE Initiative *Case Management Log* for record keeping purposes

- After renaming the *Case Management Log*, you will not be able to make changes to the graphs

Important!

- If some counselors create graphs before all data are entered, the clinic numbers will not be consistent because all counselor data will not be included in clinic totals

Saving Changes Using Save As

- Second, let's look at the *Save As* option
- Choosing the *Save As* option will allow you to rename the file

Saving Changes Using Save As

Now go to File, then click on *Save As*
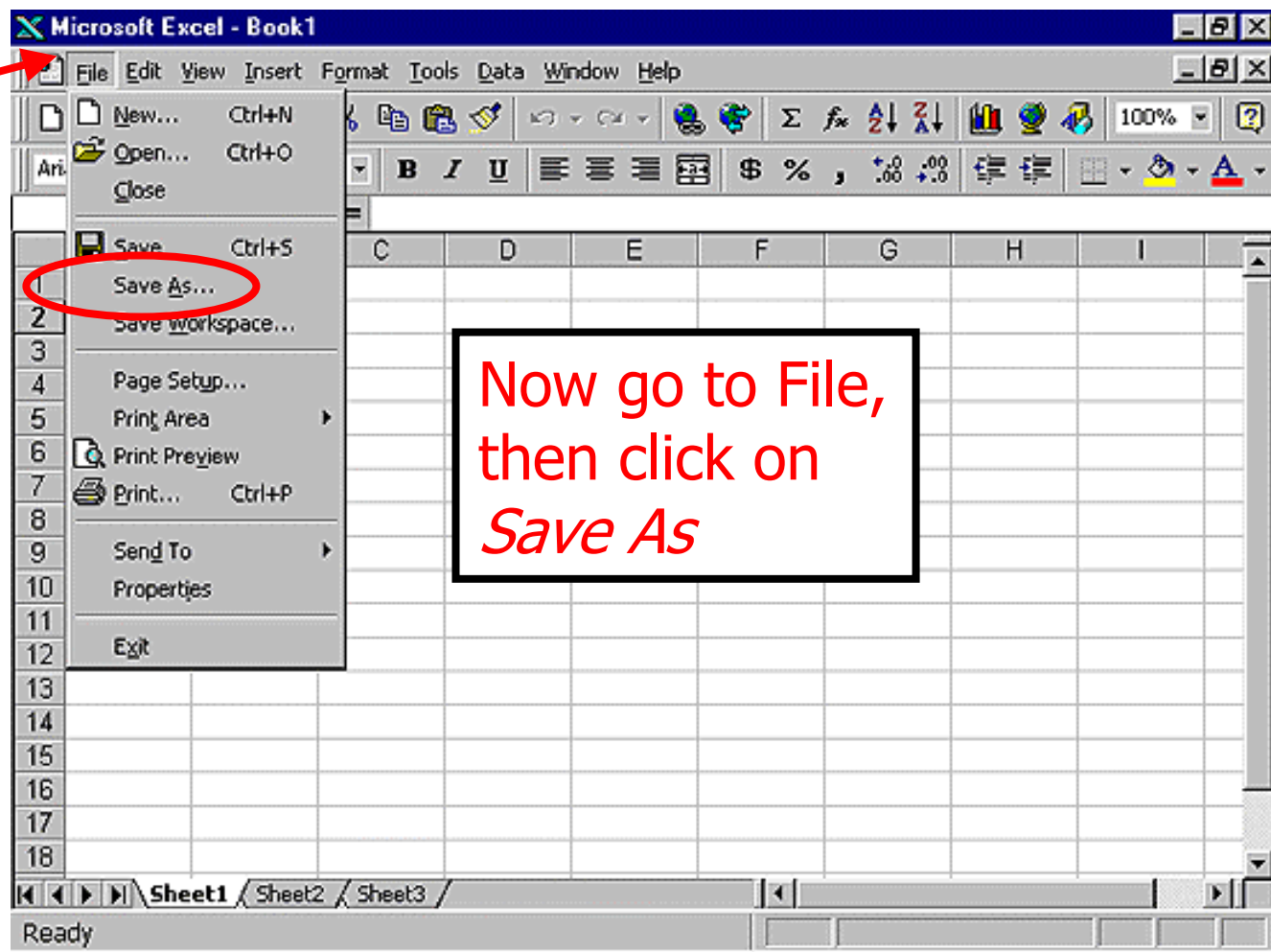
Record Keeping Using Save As

- It is a good idea to keep a record of the data and graphs for each month

- To do this, you will use the *Save As* option

- Let's use July as the current month for an example

- Before you can make a file for July, all counselors need to be up-to-date with their data entry for the month of July

- All graphs need to be created because once the file name is changed, the graphs can no longer be re-created

Remember…

- After all data are entered and all graphs are made, save the file using the *Save* option one more time to make sure all changes are saved to the OpiATE Initiative *Case Management Log*

- This will ensure that when entering the data for August, all patient and counselor information will be up to date

- After you do this you can change the file name
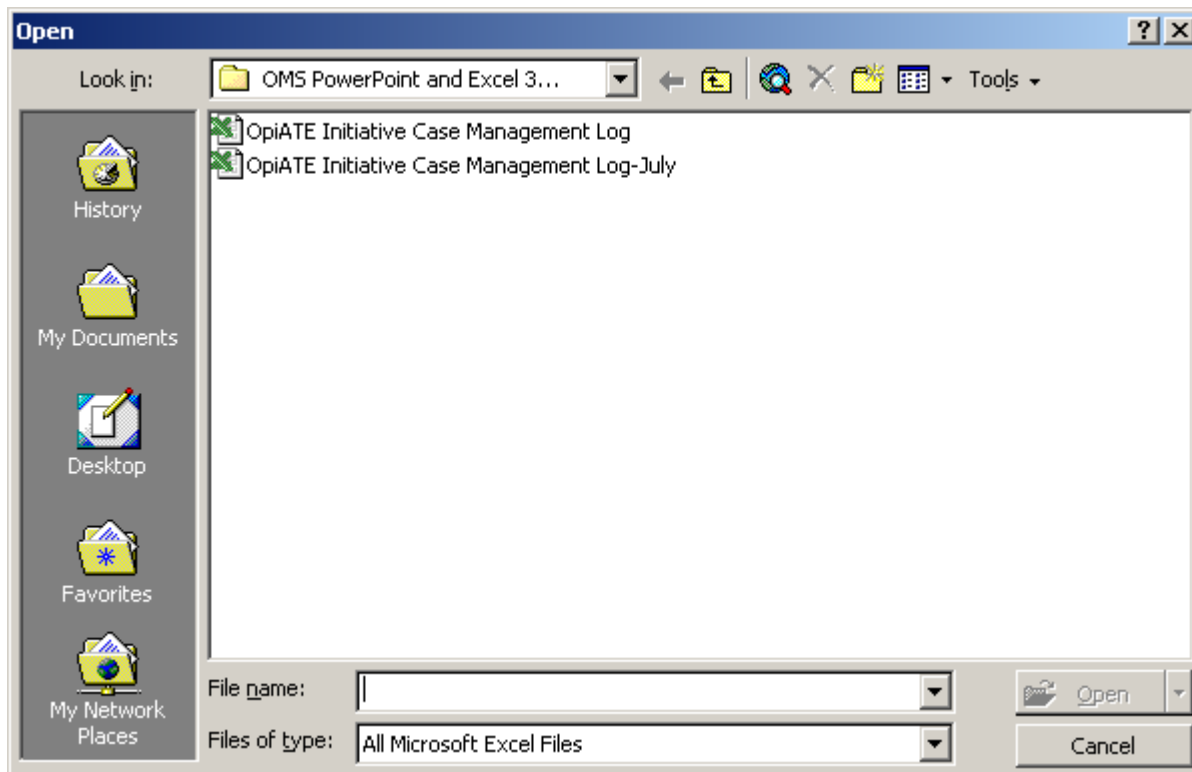
Record Keeping Using Save As
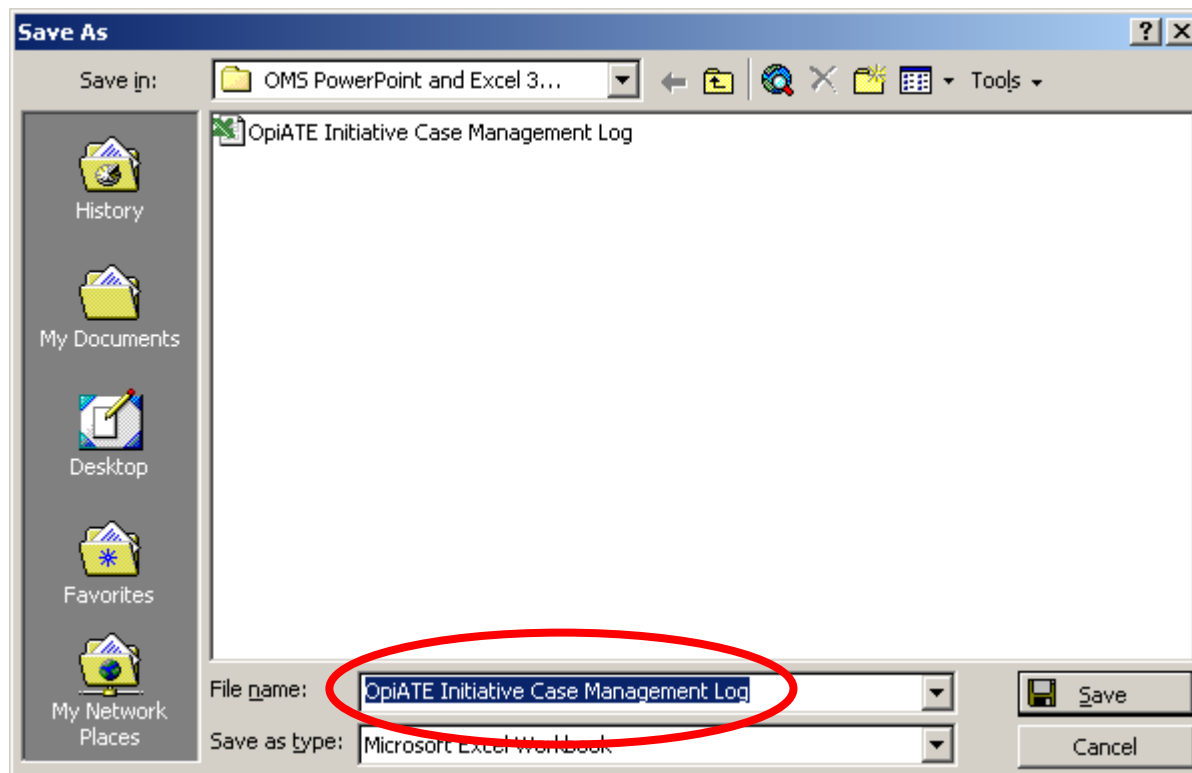
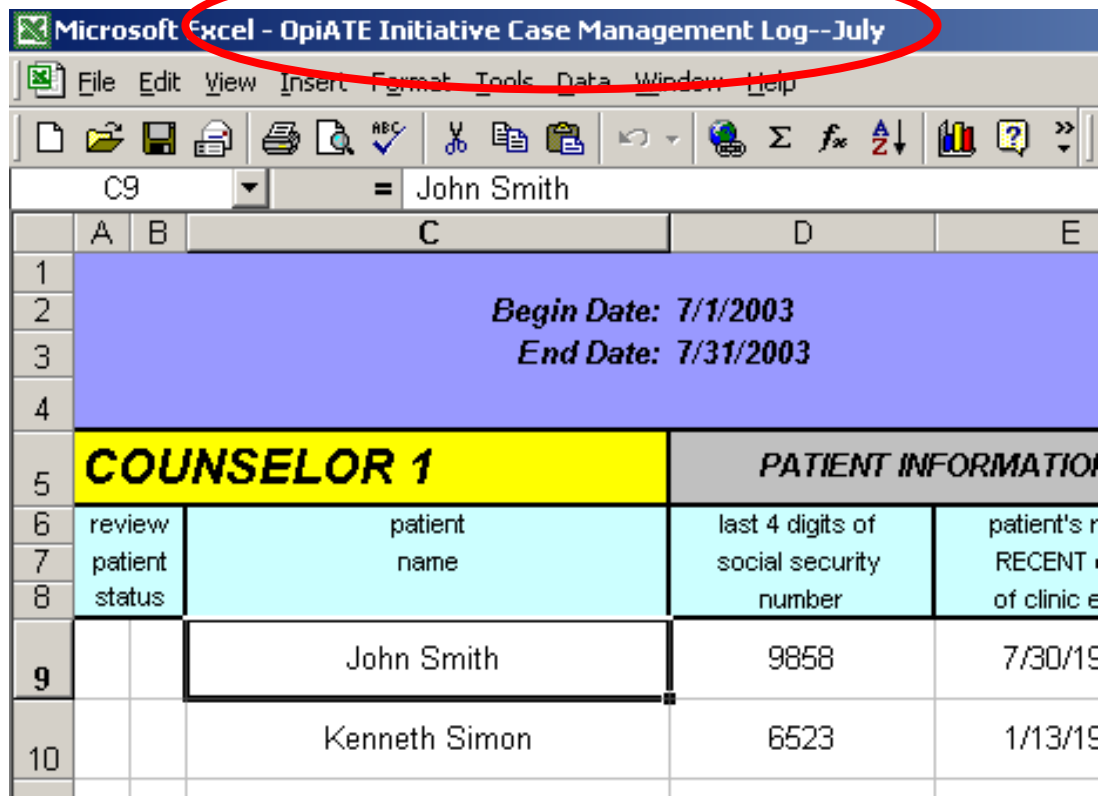- This box will appear and the name of the file will be highlighted

Record Keeping Using Save As
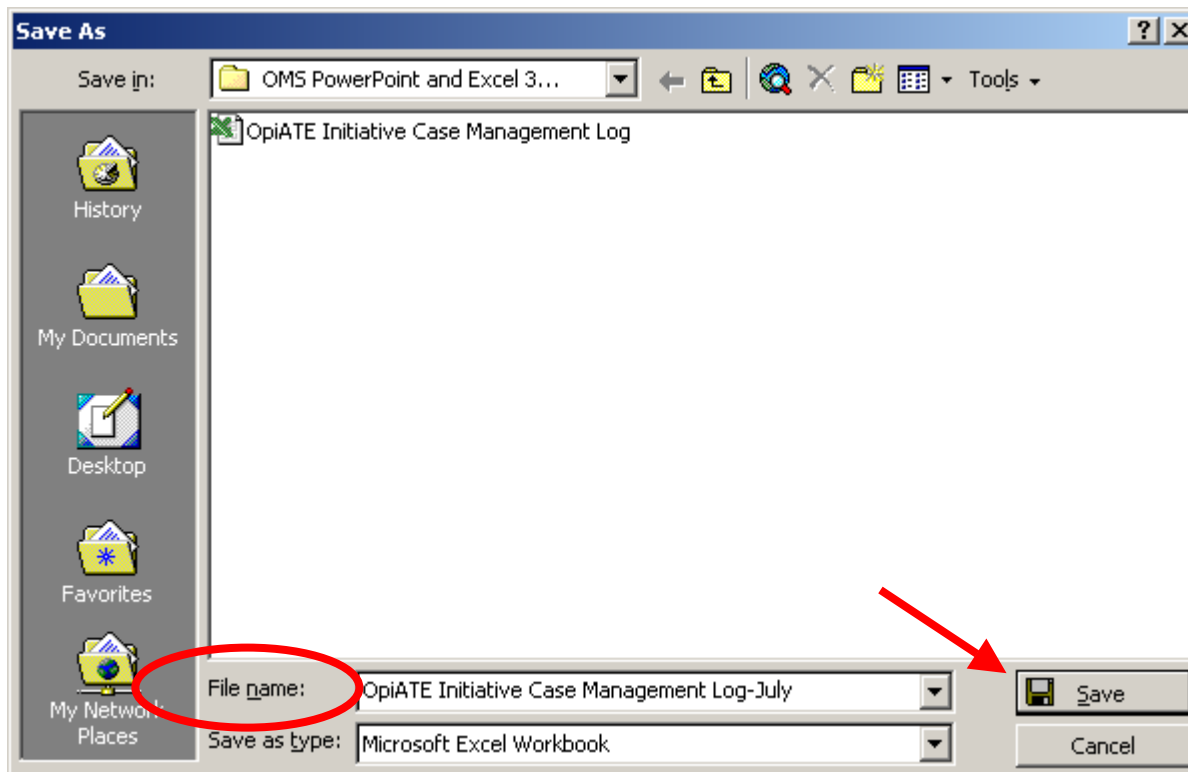
- Click in the file name box and type the word July at the end of the file name
- Then click Save
- You could also delete the entire file name and just use *July 2003* or whatever is easiest for your record-keeping needs

Record Keeping Using Save As

- Notice that when you reopen the file, there are 2 files instead of 1: the original *Case Management Log* and the *Case Management Log* for the month of July

Record Keeping

If you are ever unsure about which files you are changing, look at the top bar that displays the file name

Record Keeping Using Save As

- Using this record keeping system, you have a file with all July data. Then you can use the original file named OpiATE Initiative *Case Management Log* for your August data. You only need to delete cells that change on a monthly basis (e.g., number of counseling visits, number of utox screens, etc.).

- You do not need to delete other patient information (e.g., patient name, SSN, dose), unless that information has changed or a patient is discharged or deceased.

- After all counselor data are entered and all graphs are made for the month of August and subsequent months, you'll be able to repeat the record keeping process in order to keep track of all monthly data

Saving Changes: Save As

- Last but not least!
    - Once the file name is changed from OpiATE Initiative *Case Management Log* to a new name, you cannot delete the graphs and then recreate them!

Printing

Printing PowerPoint Slides

- To print these slides, Go to Print on the drop down menu
- This box will appear
- Choose handouts
- Choose how many slides you want to print on each page
- Click OK
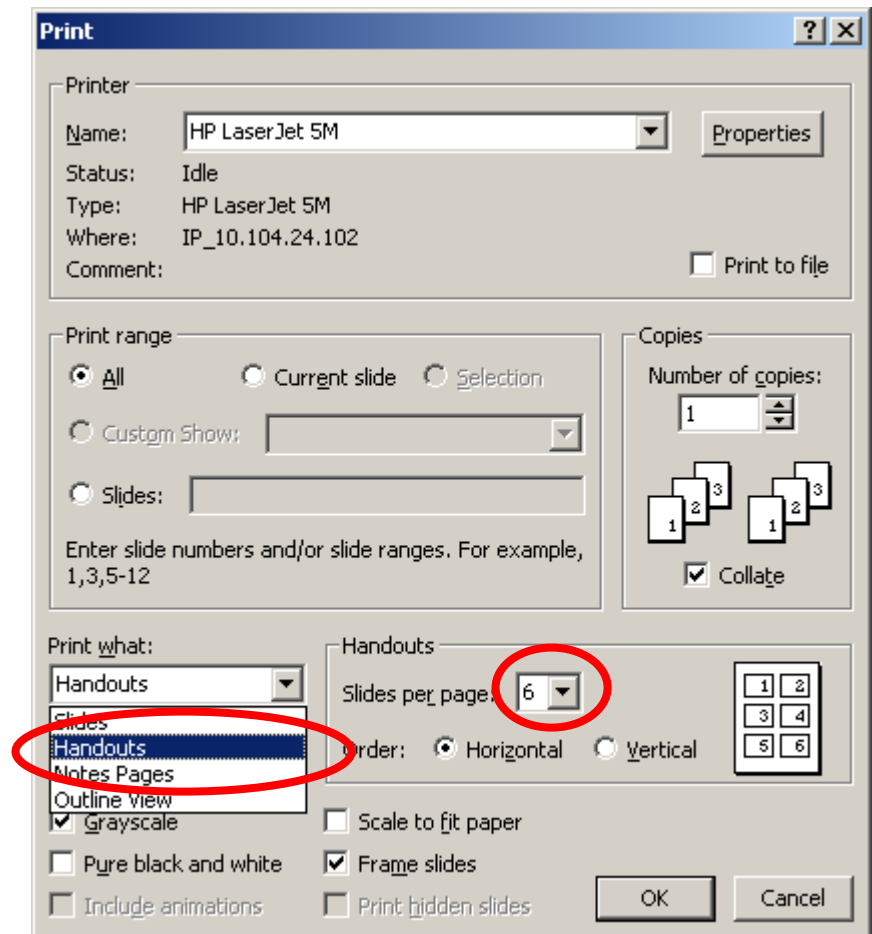
Counselor Logs

Counselor Logs in Excel

- There is a sheet tab in the *Case Management Log* labeled *Counselor Logs*

- Each patient's stable data from the past month (e.g., name, social security number, clinic entry date, etc.) transfers to this log so only patient data for the current month (e.g., counseling visits, utox screens, etc.) need to be entered

- These logs eliminate the need to re-enter each patient's entire row of data every month
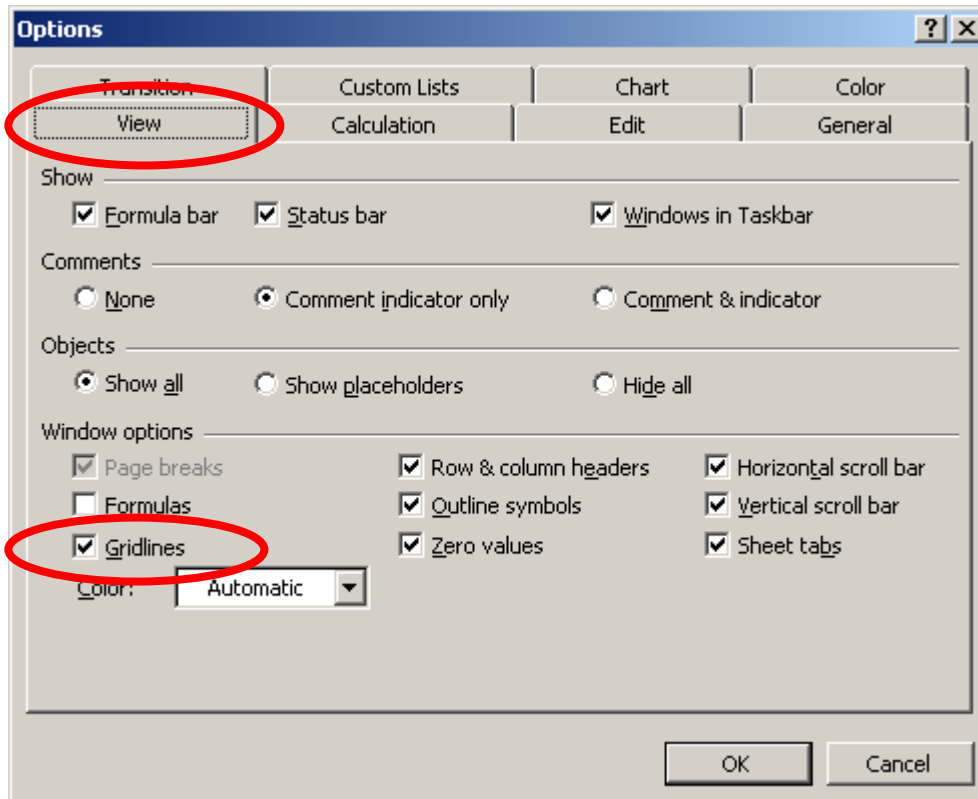
Counselor Logs in Excel

- If you choose, these sheets can be printed for each counselor so values can be entered onto a hard copy first and then transferred to the Excel *Case Management Log*

- Printing Counselor Logs eliminates the need to find a computer every time patient data need to be entered or changed

Printing Counselor Logs in Excel

- Printing the Counselor Logs can be done very easily

- The margins for the Counselor Logs are set up to print 20 patients to each page

- Each counselor has 5 pages of logs

Printing Counselor Logs in Excel

- Go to TOOLS on the main menu, then click on options
- This window will come up
- Click on the VIEW tab
- Make sure *Gridlines* is checked so all lines print on the counselor logs
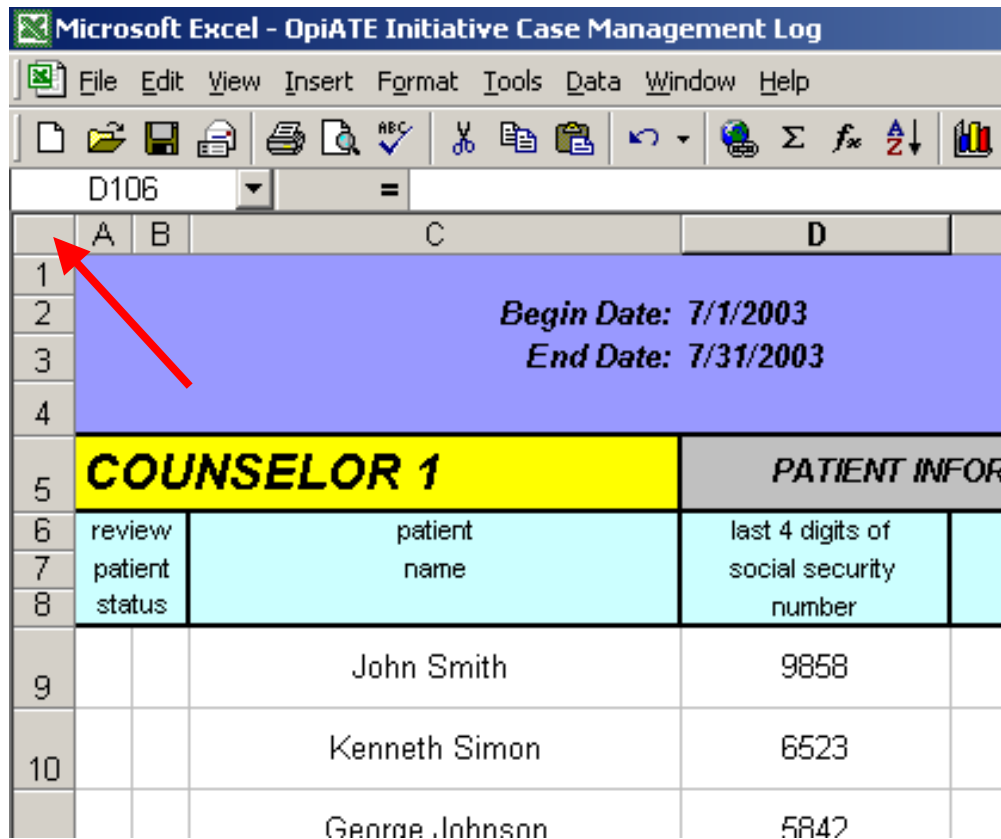
Printing Counselor Logs in Excel

- When you print, it is very important that you specify a page range

- If you just click *print* and do not specify a page range, all 60 pages will print

- In most cases, all counselors will print their own logs using the pages specified in the chart on the next slide

Printing Counselor Logs in Excel

Counselor 1	Pages: 1-5	**Counselor 7**	Pages: 31-35
Counselor 2	Pages: 6-10	**Counselor 8**	Pages: 36-40
Counselor 3	Pages: 11-15	**Counselor 9**	Pages: 41-45
Counselor 4	Pages: 16-20	**Counselor 10**	Pages: 46-50
Counselor 5	Pages: 21-25	**Counselor 11**	Pages: 51-55
Counselor 6	Pages: 26-30	**Counselor 12**	Pages: 56-60

Printing Counselor Logs in Excel

- Click on the box shown in the picture

Printing Counselor Logs in Excel

- Clicking on this box will highlight all counselor log pages
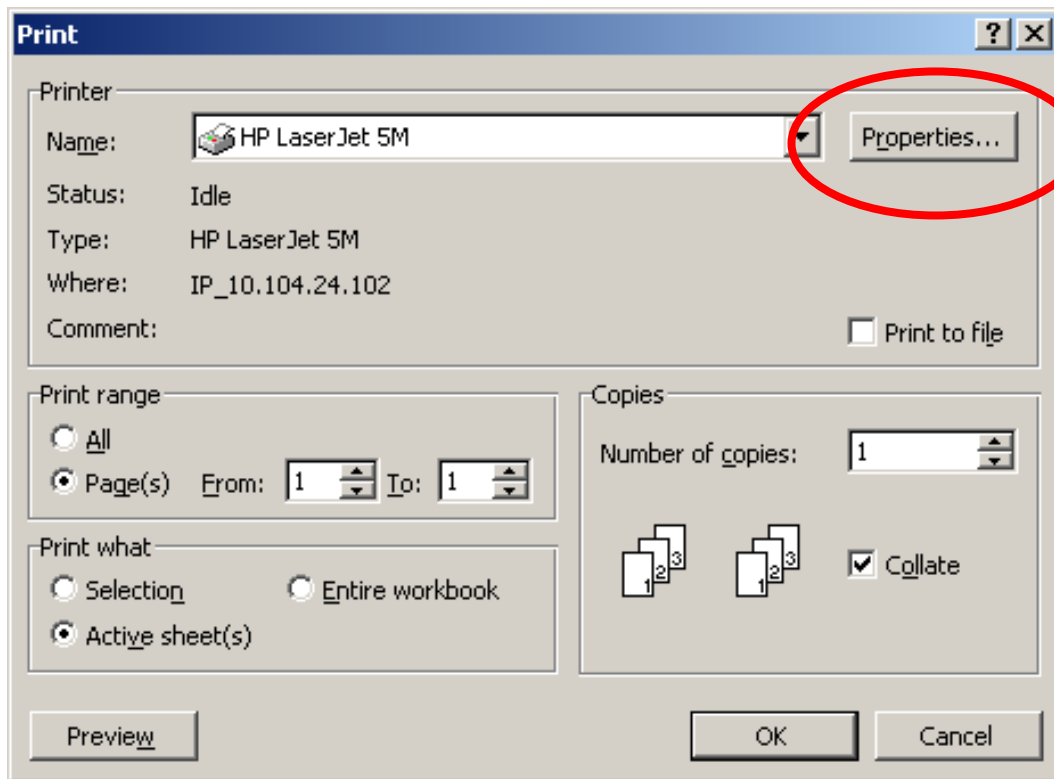
Printing Logs in Excel
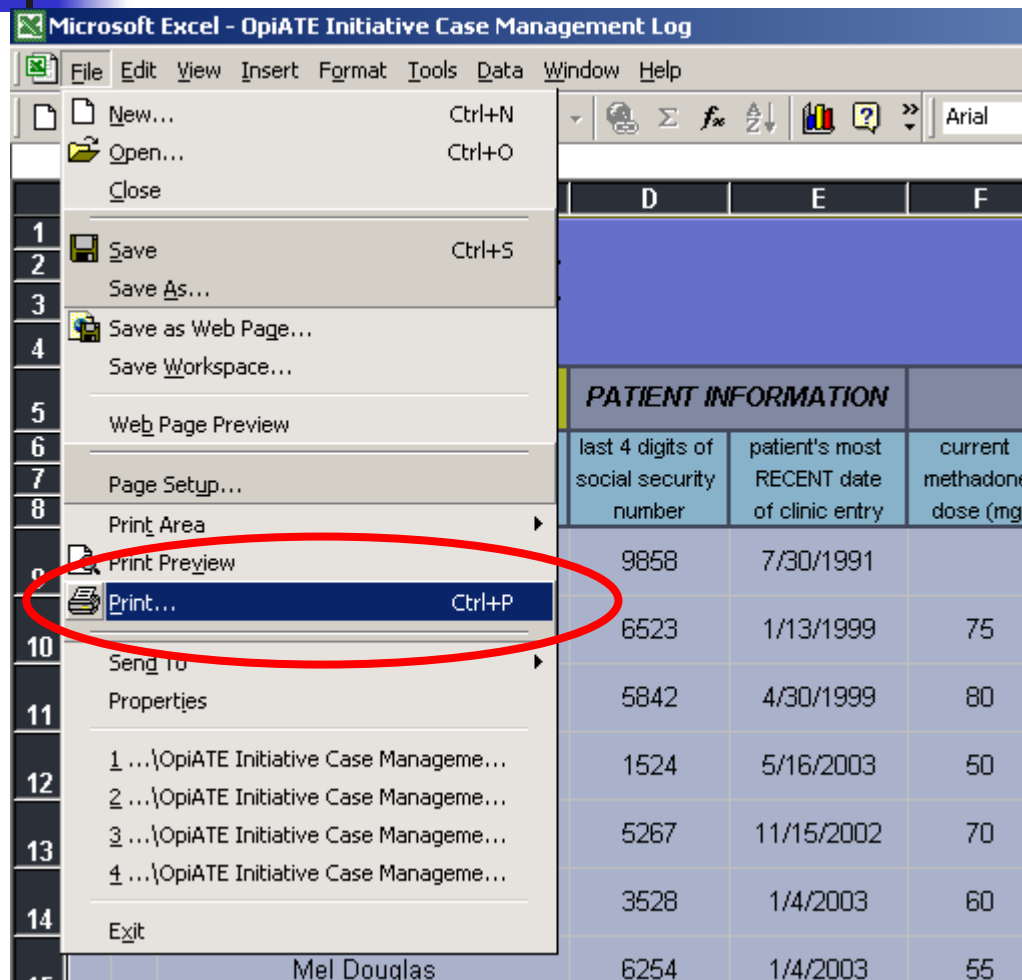
- After you have highlighted all cells and decided which pages you want to print, Go to the File menu and click on *Print*
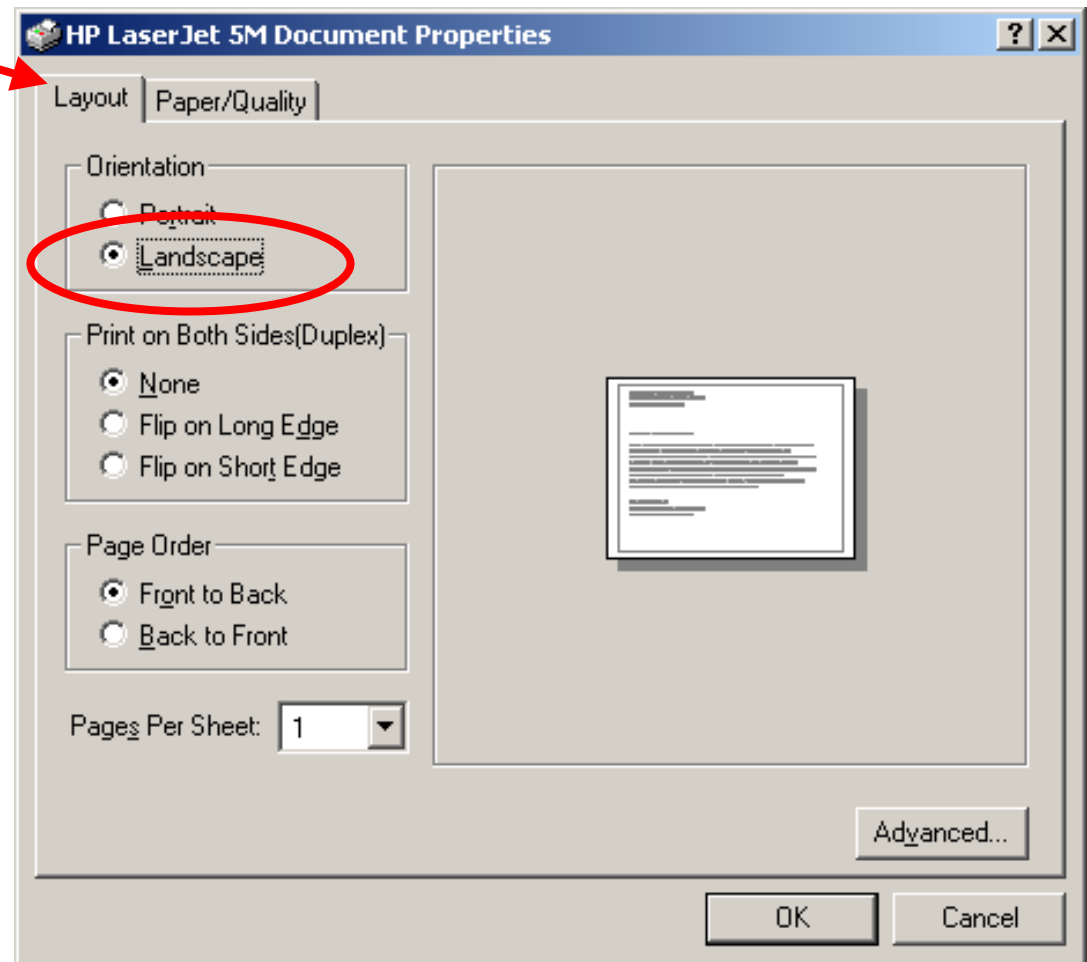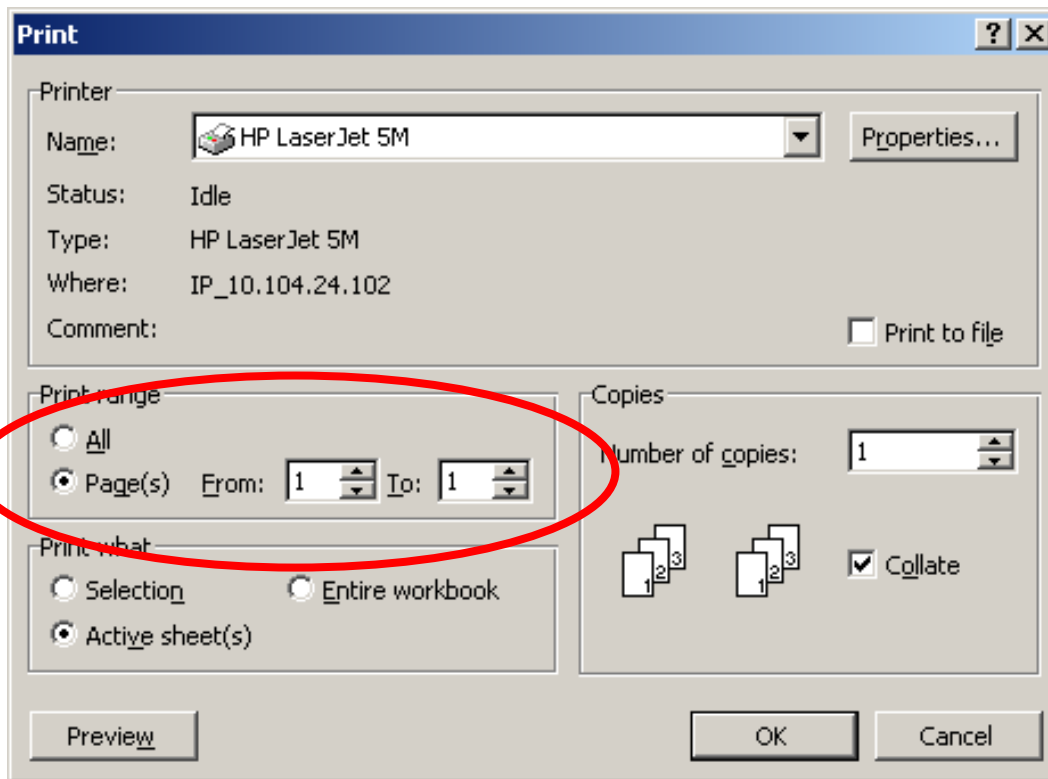
Printing Logs in Excel

- This box will come up
- Left click on *Properties*

Printing Logs in Excel

- It is important to make sure the Counselor Logs print in *Landscape* so they fit nicely on each page
- Click on the *Layout* tab
- Then click on *Landscape*
- Click *OK*

Printing Logs in Excel

- Now it is time to specify the page range
- Put the page numbers you want to print into the Print Range area
- Click *OK*

Wrapping Up

- Now that you have learned how to enter data and create graphs using the *Case Management Log* spreadsheet, go to the Excel file and try it out yourself!
- Good Luck!

Contact Information

- If you need technical assistance, please contact:
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